

2016 Atlantic Organic Production Survey Report

Prepared by



March 2017

Introduction

The Atlantic Canadian Organic Regional Network (ACORN) is the key organization for information on organic agriculture, eating organics, and connecting all the parts together. From seed to farmer to consumer, ACORN works to bring the whole picture together—making food choices healthier and more environmentally responsible.

As a non-profit organization, ACORN promotes organic agriculture by facilitating information exchange, coordinating informal education for producers and consumers, and networking with interested regional and national parties.

ACORN's Atlantic Organic Production Survey gathers the voices of organic producers and processors to glean insight into their current operations and plans for the future. Information is collected biannually on subjects relating to farming practices, type of organic production, reasons for organic certification, land use and infrastructure, and markets. ACORN and others associated organisations can use this information to support the continued growth of the Atlantic Organic sector.

Highlights

There were a total of 82 surveys completed within Atlantic Canada. There was representation from all four Atlantic Provinces with Nova Scotia having the largest amount of surveys completed (46.3% of 82) followed by Prince Edward Island (28.0%), New Brunswick (23.2%) and Newfoundland & Labrador (2.4%). Of these 82 organic operations, 64.6% gained their organic certification within the last 10 years.

The Atlantic organic sector is a mixture of large and small-scale operations with 50.0% having a farm of less than 10 acres. Of all farms, the estimated average yearly income from organic products is \$ 125 000. The most common type of organic operation was for vegetables and root crops with 64.3% of operations. The least common type of organic operation was for livestock with 86.4% of farms identifying as not producing livestock or livestock products. The two next common farm commodities were fruit (46.3%) and field crops (30.5%). There were also 31.7% of operations that offered community shared agriculture (CSA) programs.

Other notable details include that 76.9% of farm operators had either a post-secondary degree (53.7%) or diploma (23.2%). Of the 82 surveys completed there were 20 that had identified as an immigrant to Canada coming from the United Kingdom, Germany, Israel, the Netherlands, and the United States of America.

The biggest noted challenges faced by the organic sector are with certification costs, low profitability and staffing. Another current issue is marketing with over half of the surveys requesting additional assistance with the marketing of their product and operation. The future of the Atlantic organic sector is still bright with 85.3% of those surveyed having plans to either expand certified organic production or to remain the same.

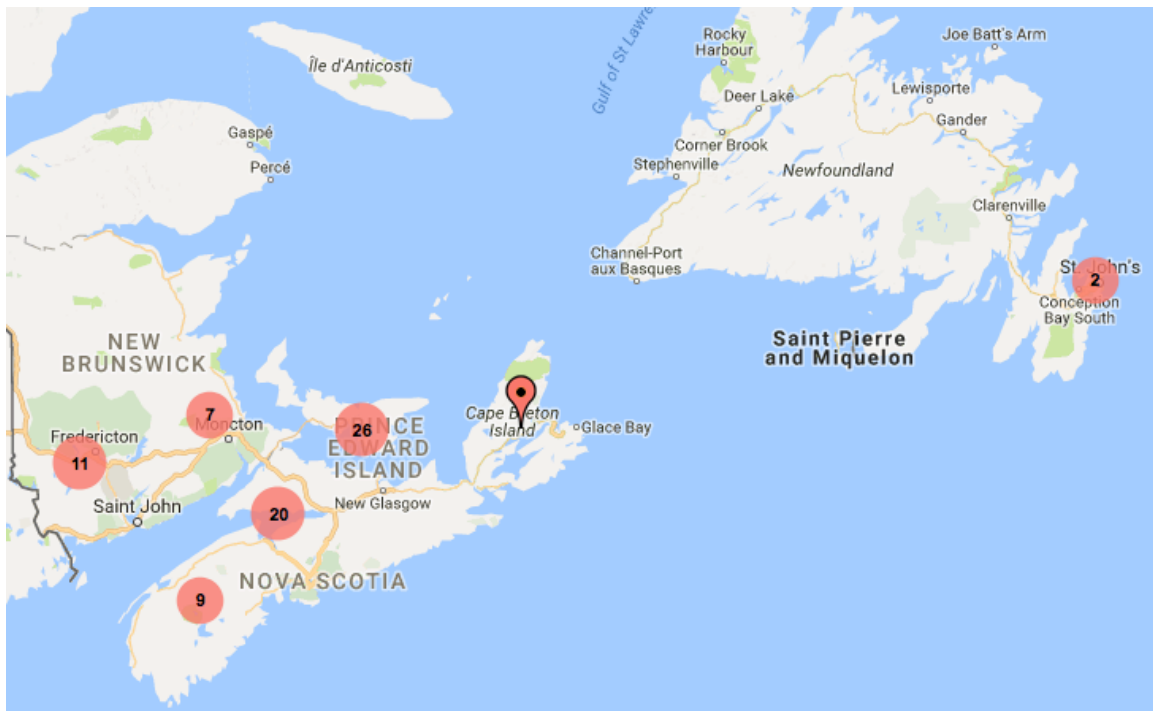
Using the data

Questions asked in the survey are written below in bold with the answers underneath. The survey had 82 responses and provides a 7% margin of error within a 90% confidence interval. The answers to the questions will have the response percentage and/or the response count for each individual answer.

Q1. Please indicate the province where your farm / business is based.

NS	46.3%	38
NB	23.2%	19
PEI	28.0%	23
NL	2.4%	2

Q2. What is your farm/business's postal code?



Q3. Please indicate your age range. **If you are not the primary (or one of the primary) operator(s) of the organic operation, please indicate the age range of one of the primary operators**

20 and under	1.2%	1
21-30	11.0%	9
31-45	25.6%	21
46-55	14.6%	12
56-69	40.2%	33
70 and up	7.3%	6

Q4. Which best describes the primary farm/business operator?

New farm operator	19.5%	16
Established farm operator	80.5%	66

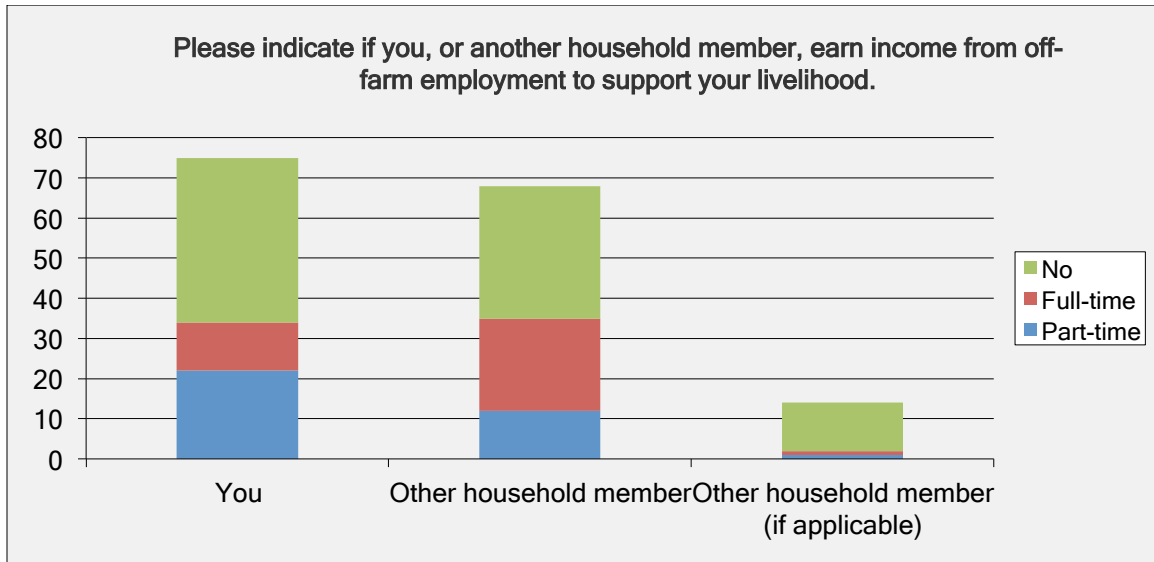
Q5. What is your highest level of education?

High School Diploma or GED equivalent	23.2%	19
Post-secondary diploma	23.2%	19
Post-secondary degree	53.7%	44

Q6. What is your relationship to organic agriculture?

Certified organic	91.5%	75
In-transition	8.5%	8

Q7. Please indicate if you, or another household member, earn income from off-farm employment to support your livelihood.



Q8. Was farming a second career for you?

Yes	56.1%	46
No	43.9%	36

Q9. How many years have you been farming?

1-2 years	1.2%	1
3-5 years	12.3%	10
6-10 years	22.2%	18
11-25 years	29.6%	24
26-40 years	25.9%	21
41-55 years	8.6%	7

Q10. What year did you begin certified organic production?

Not yet certified	7.3%	6
Before 1980	2.4%	2
1980-1985	0.0%	0
1986-1990	1.2%	1
1991-1995	7.3%	6
1996-2000	12.2%	10
2001-2005	7.3%	6
2006-2010	26.8%	22
2011-2015	34.1%	28
2016-Present	3.7%	3

Q11. What organic certifying body do you work with?

Ecocert Canada	45.1%	37
OCIA	6.1%	5
Pro-Cert	12.2%	10
TCO Cert-ACO	31.7%	26
TCO Cert-NB #1	8.5%	7
Other (TBD)	2.4%	2

Q12. What best describes your farming background?

Grew up on a farm that I am still farming	21.3%	17
Grew up on a farm, but am farming elsewhere	20.0%	16
Did not grow up on a working farm, but was raised rurally / worked on farms	17.5%	14
Grew up in an urban environment with limited exposure to farming	21.3%	17
Grew up in an urban environment, with moderate exposure to farming	16.3%	13
Other (please specify)	3.8%	3

Q13. What are your top three reasons for farming organically?

Family	34.2 %	28
Lifestyle	45.1%	37
Environment	85.4%	70
Social Justice	22.0%	18
Community Building	18.3%	15
Financial Gain	40.2%	33
Human Health	52.4%	43
Animal welfare	2.4%	2

Q14. Are you or have you been involved in:

A family farm succession process	28.0%	23
Taking over a pre-existing farm business (non family transfer)	4.9%	4
Starting a farm business from scratch	72.0%	59
None of the above	6.1%	5

Q15. Approximately how many acres (certified organic) do you have in total production including cover and rotational crops?

0-1	12.2%	10
1-2	12.2%	10
3-4	11.0%	9
5-10	14.6%	12
11-15	9.8%	8
16-25	4.9%	4
26-50	4.9%	4
51-100	6.1%	5
101-200	4.9%	4
201-300	2.4%	2
301-400	7.3%	6
401-500	3.7%	3
501-750	2.4%	2
751-1 000	3.7%	3

Q16. What is the size of the farm operation (in acres)?

Acres	Total acres owned	Total acres rented / leased	Acres certified as organic	Certified organic acres under production	Acres left fallow for soil building	Acreage in transition	Acreage under conventional production
0-1	7.3%	28.0%	6.1%	7.3%	25.6%	32.9%	39.0%
1-2	2.4%	0.0%	8.5%	11.0%	2.4%	0.0%	0.0%
3-4	2.4%	2.4%	7.3%	11.0%	6.1%	1.2%	0.0%
5-10	3.7%	4.9%	9.8%	13.4%	8.5%	2.4%	0.0%
11-15	4.9%	3.7%	7.3%	7.3%	1.2%	6.1%	0.0%
16-25	6.1%	2.4%	6.1%	3.7%	2.4%	0.0%	0.0%
26-50	13.4%	4.9%	9.8%	6.1%	6.1%	2.4%	2.4%
51-100	11.0%	6.1%	11.0%	4.9%	7.3%	3.7%	1.2%
101-200	24.4%	1.2%	7.3%	4.9%	2.4%	2.4%	1.2%
201-300	14.6%	3.7%	2.4%	1.2%	0.0%	1.2%	2.4%
301-400	3.7%	1.2%	4.9%	7.3%	0.0%	0.0%	0.0%
401-500	1.2%	1.2%	3.7%	3.7%	0.0%	0.0%	0.0%
501-750	3.7%	2.4%	2.4%	2.4%	0.0%	0.0%	0.0%
751-1000	0.0%	2.4%	3.7%	3.7%	0.0%	0.0%	0.0%

Q17. Did you immigrate to Canada?

Yes 24.4% 20
 No 75.6% 62

Q18. Where did you emigrate?

United Kingdom 30.0% 6
 Germany 10.0% 2
 Israel 10.0% 2
 Netherlands 15.0% 3
 USA 35.0% 7

Q19. What year did you immigrate to Canada?

1969	5.0%	1
1975	10.0%	2
1978	20.0%	4
1981	10.0%	2
1986	5.0%	1
1997	5.0%	1
2000	5.0%	1
2002	10.0%	2
2007	5.0%	1
2010	5.0%	1
2011	10.0%	2
2012	5.0%	1
2015	5.0%	1

Q20. Is your farm a market farm? (Small-scale mixed horticultural production)

Yes	62.5%	50
No	37.5%	30

Q21. Please indicate what type of production BEST describes your operation by selecting the category(ies) that applies to your certified organic activities.

Vegetable and root crops	63.0%	51
Fruit / vineyard	40.7%	33
Livestock	30.9%	25
Field Crops	24.7%	20
Flowers	16.0%	13
Pasture and forage crops	19.8%	16
Maple	2.5%	2
Seed	13.6%	11
Food &/or beverage processor	4.9%	4
Non-food processor	1.2%	1
Other	7.4%	6

Q22. What does your farm produce commercially and what are the production practices you use?

	Conventional	Certified organic	Non-certified organic	No-till	Pasture	Permaculture	Holistic	Biodynamics	Urban
Bee & honey products	2.5%	3.7%	4.9%	0.0%	1.2%	1.2%	1.2%	0.0%	0.0%
Beef	6.2%	7.4%	9.9%	2.5%	9.9%	1.2%	1.2%	2.5%	0.0%
Dairy	0.0%	3.7%	2.5%	2.5%	3.7%	1.2%	1.2%	0.0%	0.0%
Eggs	4.9%	12.3%	9.9%	0.0%	8.6%	1.2%	1.2%	0.0%	0.0%
Pigs	3.7%	3.7%	1.2%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%
Poultry	3.7%	7.4%	6.2%	0.0%	7.4%	1.2%	1.2%	0.0%	0.0%
Sheep	1.2%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wool and wool products	1.2%	0.0%	4.9%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Other livestock	0.0%	1.2%	2.5%	0.0%	1.2%	1.2%	1.2%	0.0%	0.0%
Berries	1.2%	39.5%	2.5%	2.5%	0.0%	1.2%	0.0%	0.0%	0.0%
Cut flowers	1.2%	12.3%	8.6%	1.2%	0.0%	0.0%	1.2%	0.0%	0.0%
Field crops	2.5%	39.5%	6.2%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%
Forestry	0.0%	3.7%	3.7%	1.2%	0.0%	0.0%	1.2%	0.0%	0.0%
Grains	2.5%	21.0%	2.5%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Greenhouse	1.2%	12.3%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Mushrooms	0.0%	48.1%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nursery	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Seeds	0.0%	8.6%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Beverages	0.0%	16.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	1.2%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Q23. Did you produce any organic vegetable crops during 2016?

Yes 64.3% 51
 No 35.4% 28

Q24. What three vegetable crops account for your highest portion of sales in terms of monetary value?

Greens (salad, lettuce, spinach) 75.6%
 Carrots 40.0%
 Tomatoes 35.6%
 Potatoes 20.0%
 Garlic 17.8%

Q25. Did you produce any organic fruit during 2016?

Yes 46.3% 38
 No 53.7% 44

Q26. Which three fruits account for your highest portion of sales in terms of monetary value?

Blueberries	28.6%	
Apples	25.7%	
Strawberries	25.7%	
Currants	22.9%	
Gooseberries	14.3%	

Q27. Did you produce organic wine or organic wine grapes in 2016?

Yes	4.9%	4
No	95.1%	78

Q28. How many acres of organic wine grapes do you currently have in production?

0-1	50.0%	2
2-3	25.0%	1
4-5	25.0%	1

Q29. If you are an organic wine grape producer, please review your sales records and estimate the total amount of grapes sold—in kg—for the 2016-growing season (defined as April-December 2016). Please give us your best estimate.

26-50	33.3%	1
501-750	25.0%	1
1 001-1 500	33.3%	1

Q30. If you produce organic wine, please review your sales records and estimate the total amount of wine sold—in litres—for 2016. Please give us your best estimate.

401-500	100%	1
---------	------	---

Q31. Did you produce organic hops or organic beer in 2016?

Yes	3.7%	3
No	96.3%	79

Q32. How many kilograms of organic hops did you grow in 2016?

0-25	33.3%	1
26-50	25.0%	1
51-100	33.3%	1

Q33. If you produce organic beer, please review your sales records and estimate the total amount of beer sold—in litres—for 2016. Please give us your best estimate.

1 501-2 000 100% 1

Q34. Did you produce any animal products in 2016?

Yes 13.4% 11
No 86.3% 71

Q35. What are the top three organic livestock products that account for your highest portion of sales in terms of monetary value?

Chicken 70%
Eggs 50%
Beef 40%

Q36. Did you produce any organic field crops during 2016?

Yes 30.5% 25
No 69.5% 57

Q37. What are the top three organic field crop products that account for your highest portion of sales in terms of monetary value?

Soybeans 52.6%
Oats 36.8%
Wheat 26.3%
Hay 21.0%
Spelt 15.8%

Q38. Did you produce organic maple syrup or other organic maple products in 2016?

Yes 2.5% 2
No 97.5% 80

Q39. Please indicate the approximate number of taps you have dedicated to local markets:

0-500 1
501-1000 1

Q40. Do you offer any value added maple products on your farm? Please list:

Maple butter 1

Q41. Did you produce any other organic products in 2016 not already accounted for in previous sections?

Yes	15.8%	13
No	84.2%	69

Q42. What other organic products do you produce?

Alcoholic beverages	0
Non-alcoholic beverages	2
Cut-flowers	8
Coffee	4
Inputs (i.e. compost)	0
Jams / jellies	0
Mushroom	2
Pickles or preserves	2
Sea vegetables	0
Seed	3
Spices	2
Tea	4

Q43. What is the market demand for the products you are currently producing?

More demand than you can meet	33.8%	24
Steady demand	57.7%	41
Declining demand	8.5%	6

Q44. In order to reach your markets, buyers, and customers, approximately how many kilometres do you travel on a weekly basis?

0	13.6%	9
1-5	0.0%	0
6-10	1.5%	1
11-25	10.6%	7
26-50	9.1%	6
51-100	27.3%	18
101-200	15.2%	10
201-300	10.6%	7
301-400	1.5%	1
401-500	4.5%	3
501-750	1.5%	1
751-1 000	0.0%	0
1 001-1 500	3.0%	2
1 501-2 000	0.0%	0
2 001-3 000	1.5%	1

Q45. Are there markets you would like to reach but cannot access because you are limited by distribution challenges?

Yes	29.6%	21
No	70.4%	50

Comments:

“Markets in other provinces, need distribution”

“PEI: extra cost for delivery because of bridge. There are additional transportation and storage challenges throughout the year to get our berries from the field to the final customer.”

“Unable to export organic beef as there is no federally approved organic meat processor in the Maritimes. The demand for organic beef is high both domestic and international”

“Shortage of production, money to increase infrastructure, and labour”

“We currently travel over 200km, twice a week to Moncton/Dieppe - one day for a farmers' market, one day for restaurant/retail deliveries. Demand for a midweek delivery to restaurants/stores is strong, but at our current scale, it is not worth it for us to continue - too much travel time, too much time away from the farm, and not enough production from just our farm. We will deliver to these customers on Saturdays, but they much prefer midweek - and we would probably sell more this way”

“Moncton, Halifax. Too far to drive with too little stuff.”

“Getting products to far flung resorts like Fox Harbour and Keltic Lodge”

“Distance and associated cost to service market”

“Would like to offer more CSA shares in other surrounding communities (Cocagne, Shediac, more in Riverview and Sackville) but am limited by amount I can produce, by time it would take to drive to these communities and limited by cost of transportation including size of the transportation vehicle.”

“Small or no distribution systems in place for PEI. Shipping around the island and/or on/off the island from the Maritimes is very expensive.”

“I could sell some strawberries in Halifax but the orders aren't large enough to cover the transportation costs so I'm going to discontinue serving this market next year.”

Q46. Please indicate the type of infrastructure most needed to support your production, marketing and distribution.

Livestock infrastructure (i.e. inspected abattoir, fencing, housing)	26.8%	19
Marketing and distribution Infrastructure (i.e. advertising, transportation)	38.0%	27
Post harvest handling / cleaning / processing / preparation facilities	38.0%	27
Season extension infrastructure (i.e. greenhouses, hoop houses, tunnels, etc.)	35.2%	25
Storage facilities (on-farm or off-farm)	40.8%	29
Value-added infrastructure (i.e. community kitchen, processing equipment)	16.9%	12
No infrastructure needed	15.5%	11

Q47. How or where do you sell your products?

Farmers market	54.9%	39
CSA/ Farm share	35.2%	25
Wholesale	43.7%	31
Restaurants	36.6%	26
Cooperatives	4.2%	3
Other collaborative partnerships	7.0%	5
Farm gate	53.5%	38
Export market	14.1%	10
Supply managed markets	0.0%	0
Marketing boards	2.8%	2
Contract	9.9%	7
Auction	1.4%	1
Broker	14.1%	10
Elevator	1.4%	1
Retailer	28.2%	20
Processor	15.5%	11
Other	7.0%	5

Q48. Does your farm offer a CSA program?

Yes	31.7%	26
No	68.3%	56

Q49. What type(s) of CSA do you run?

Fruit	16.7%	4
Vegetable	83.3%	20
Bread	4.2%	1
Livestock products	20.8%	5
Other	4.2%	1

Q50. Approximately what percentage of your farm's sales is a direct result from your CSA operation?

Average:	49.1%	24
Min:	10%	
Max:	90%	

Q51. What year did you start your CSA?

2016	8.7%	2
2015	4.3%	1
2014	13.0%	3
2013	4.3%	1
2012	8.7%	2
2011	13.0%	3
2010	4.3%	1
2009	17.4%	4
2008	4.3%	1
2007	8.7%	2
2006	8.7%	2
2001	4.3%	1

Q52. How many months in 2016 did your CSA operate?

12 months	8.3%	2
11 months	0.0%	0
10 months	4.2%	1
9 months	4.2%	1
8 months	0.0%	0
7 months	8.3%	2
6 months	16.7%	4
5 months	29.2%	7
4 months	20.8%	5
3 months	4.2%	1
2 months	0.0%	0
1 month	4.2%	1

Q53. How frequently are your CSA shares delivered?

Weekly	79.2%	19
Bi-weekly	12.5%	3
On demand	8.3%	2
Other	12.5%	3

Q54. What was your WEEKLY price for share in 2016?

Full/Large	\$25.63	19
Half/Small	\$19.00	11
Week-to-week/opt-in	\$21.67	3

Q55. Will you expand your CSA program for 2017?

Yes	52.2%	12
No	30.4%	7
Uncertain	17.4%	4

Q56. What percentage of your 2016 CSA shares was sold to existing customers from 2015?

Average:	66.6%	24
Min:	0%	
Max:	100%	

Q57. Do you currently have a waitlist for your CSA shares? If so, how big is the waitlist?

0	66.7%	16
1-5	16.7%	4
6-10	12.5%	3
11-15	0.0%	0
16-20	4.2%	1

Q58. What were your annual sales of certified organic products in 2016?

Less than \$5 000	14.5%	10
\$5 000 - \$10 000	5.8%	4
\$10 000 - \$15 000	10.1%	7
\$15 000 - \$20 000	2.9%	2
\$20 000 - \$30 000	7.2%	5
\$30 000 - \$40 000	5.8%	4
\$40 000 - \$60 000	11.6%	8
\$60 000 - \$80 000	5.8%	4
\$80 000 - \$100 000	4.3%	3
\$100 000 - \$500 000	26.1%	18
\$500 000 - \$1 million	0.0%	0
More than \$1 million	1.4%	1
Prefer not to say	4.3%	3

Approximate average: \$125 000

Q59. Do your revenues exceed your costs?

Yes - making a profit	44.9%	31
Breaking even	36.2%	25
No - losing money	18.8%	13

Q60. Considering what knowledge or skills would most readily benefit your farm or processing operation, please indicate your level of interest in training opportunities for the following topics. (Ranked on a scale of 0 to 3)

Business Management Planning / HR	2.13
Compost	2.05
Cover Crops	2.26
Seed Production	1.87
Farm Health and Safety	1.79
Fruit	2.16
Grains & Field Crops	1.75
Homesteading	1.32
Irrigation	2.00
Marketing and Sales	2.32
New Production Opportunities	2.17
Organic Certification	1.80
Organic Processing	1.92
Soil Fertility	2.64
Tools, Technologies and Farm Infrastructure	2.45
Vegetables	2.11
Weed Management	2.47

Q61. Which activities would be the most effective support measures for your farm training needs? (Ranked on a scale of 0 to 4)

Group consultation	3.63
One-on-one consultation	3.70
In-person workshops	3.28
Guidebooks	3.26
Kitchen-table meetings	3.20
Online forum	2.55
Videos	3.29
Webinars	2.97

Q62. Did you do any formal or informal study to prepare you for farming?

Self taught – experimental	74.6%	50
Farmer-to-farmer	59.7%	40
Incubator farm programs or farmer schools	4.5%	3
On-farm training (including internships or jobs)	19.4%	13
Websites	38.8%	26
Books/ periodicals/ magazines	58.2%	39
Online courses/ distance learning	9.0%	6
Workshops and/ or conferences	61.2%	41
University or college program in agriculture	19.4%	13
University or college program in something other than agriculture	17.9%	12

Q63. What additional services or assistance do you need?

Distributing	26.1%	18
Marketing products	50.7%	35
Education or training	24.6%	17
Energy efficiency	27.5%	19
Accessing equipment	31.9%	22
Processing	18.8%	13
Shared storage	15.9%	11
Accessing government programs	39.1%	27
Certification process	18.8%	13
None needed	18.8%	13
Other	7.2%	5

Q64. What best describes your farm/business plans for the next 10 years?

Expand certified organic production	51.5%	35
Remain the same	33.8%	23
Reduce certified organic production	2.9%	2
Discontinue certified organic production	5.9%	4
Uncertain	16.2%	11

Q65. Will you be increasing or decreasing existing production in 2017?

Increasing certified acreage	47.1%	32
Increasing crops or products	45.6%	31
Decreasing crops or products	26.5%	18

Q66. What is your top three challenges faced as a farmer?

Certification requirements	10.3%	7
Certification costs	27.9%	19
Receiving a fair price/ low profitability	22.1%	15
Staffing	27.9%	19
Selling products	20.6%	14
Receiving a fair price for products	13.2%	9
Low profitability	44.1%	30
Accessing equipment	19.1%	13
Government standards	4.4%	3
Accessing government programs	14.7%	10
Accessing financing	14.7%	10
Marketing Board Regulations	1.5%	1
Lack of processing capacity	14.7%	10
Distribution	17.6%	12
Food safety requirements	13.2%	9
Accessing land	10.3%	7
Training	4.4%	3
Business knowledge	4.4%	3
Other	14.7%	10