



PUBLIC ACCOUNTABILITY AND REPORTING PROJECT (PARP)

**Summary Report
October 2019**

**BC Farm Industry
Review Board**

Contents

BC Farm Industry Review Board Introductory Comments	1
Guide to the Reader	3
Sector Performance Targets.....	5
Supply Managed Sectors.....	5
Provincially Regulated Sectors	12
Governance	14
Quota Management and Movement	18
Conclusion	28
References.....	29
Appendices.....	30

BC Farm Industry Review Board Introductory Comments



The BC Farm Industry Review Board (BCFIRB) is pleased to present its 2019 Summary Report for BCFIRB's Public Accountability

and Reporting Project (PARP). This report is the first of its kind and we would like to thank B.C.'s agricultural commodity boards and commissions for their contributions.

BCFIRB is an independent administrative tribunal, responsible under the *Natural Products Marketing (BC) Act* (NPMA) for the supervision of B.C.'s eight agriculture commodity boards and commissions (the boards). It provides oversight and policy direction to ensure sound marketing policy and to protect the public interest. BCFIRB also hears appeals and complaints under its three statutory mandates, the NPMA, the *Farm Practices Protection (Right to Farm) Act*, and the *Prevention of Cruelty to Animals Act*.

B.C.'s commodity boards are granted significant legislative powers to manage their regulated commodities, and are first instance regulators. Good governance and informed, strategic decision-making are essential elements to deliver sound marketing policy outcomes that matter.

The PARP originated from BCFIRB's February 2018 Quota Assessment Tools Supervisory Review decision (Quota Review). In the review, BCFIRB examined its 2005 quota policies and directions to determine if they continued to deliver sound marketing policy. BCFIRB noted a lack of data and objective evidence against which to assess the board recommended changes. To address this gap and facilitate future requests to amend quota policies, BCFIRB directed the boards to start publicly and annually reporting on quota management and data to demonstrate if they continue to reflect sound marketing policy and serve the public interest. BCFIRB also stated in its decision that the expanded quota reporting was to be incorporated in to a broader set of reporting expectations and performance measures around board governance, to be developed in consultation with all boards.

The PARP has a different focus from, and expands on, the information reported in existing commodity board annual reports. The PARP reporting process through BCFIRB also enables consistency in the information reported by each board.

BCFIRB worked in consultation with the boards in 2018 to develop criteria for reporting on sector performance targets, governance practices and quota management and movement. In 2018, each board was asked to provide a public report to BCFIRB on these targets and measures by June 2019.

BC Farm Industry Review Board
Introductory Comments

The PARP's overall goal is to support and publicly demonstrate effective governance and leadership of the regulated agricultural sectors. This goal supports BCFIRB in carrying out its responsibilities as an independent supervisor of regulated marketing. The information will help provide the agri-food industry, government, the boards and BCFIRB with a deeper understanding of the current state of each regulated sector and eventually, a comprehensive, objective, evidence-based picture of how each sector is evolving over time.

Going forward, BCFIRB will use the PARP to inform its own annual reports, illustrating how BCFIRB's policies and decisions reflect legislative intent, sound marketing policy and the public interest.

We again thank the boards and look forward to continuing to work together on this important project.



Al Sakalauskas
Vice Chair, BCFIRB

Guide to the Reader

Supply Management and Regulated Marketing

In Canada and B.C., the production and marketing of certain agriculture commodities is regulated by the federal and provincial governments. Supply managed agricultural commodities in Canada include broiler hatching eggs, chicken, milk (cow), eggs and turkey.

Supply management is a national, trade compliant, regulatory system intended to help ensure a continuous and stable supply of domestic commodities for consumers and a fair return for efficient producers. All provinces participate in Canada's supply management system. It is established through federal and provincial legislation which allows for price, production and import controls, and is coordinated through federal-provincial agreements.

Provincially regulated agricultural commodities in B.C. include vegetables, cranberries and hogs. Regulations enable the coordination of marketing and, for vegetables, price and production controls.

B.C.'s Agricultural Commodity Boards and Commissions

As first instance regulators, boards must be responsive to the needs of producers, processors, consumers and other participants in the agri-food industry. B.C.'s boards include:

- *BC Broiler Hatching Egg Commission*
- *BC Chicken Marketing Board*
- *BC Cranberry Marketing Commission*
- *BC Egg Marketing Board*
- *BC Hog Marketing Commission*
- *BC Milk Marketing Board*
- *BC Turkey Marketing Board*
- *BC Vegetable Marketing Commission*

Public Accountability and Reporting Project (PARP)

BCFIRB is mandated to provide oversight and policy direction to the boards to ensure sound marketing policy and to protect the public interest. To assist in meeting these responsibilities, BCFIRB initiated the PARP in March 2018. In August 2018, boards were asked to prepare public reports containing information in three main areas:

- ***Sector Performance Targets***
- ***Governance***
- ***Quota Management and Movement***

The boards' PARP reports were provided to BCFIRB in June 2019. The reports can be found [at this link](#) and on BCFIRB's [website](#).

Sector Performance Targets

BCFIRB believes that clear sector performance targets are essential to establishing and communicating the future direction and structure of B.C.'s regulated sectors. Performance targets can be evaluated and updated over time. Targets help ensure all participants in the agri-food industry know the vision for the regulated sectors, as set by the boards. The PARP highlights board strategic sector goals, other areas of strategic focus and their status.

Governance

The boards were asked to report on their use or adoption of basic good governance tools and practices such as codes of conduct, conflict of interest policies, training and orientation, financial accountability and stakeholder consultation.

Quota Management and Movement

Having consistent and comprehensive quota data collected over time is essential to understanding and monitoring how supply managed sectors are operating and evolving in B.C. The PARP expands on, and adds cross-sectoral consistency to, existing supply management board quota reporting. Knowing the “what, where and how” of quota production over time will provide a clear picture of the management and operation of each of the supply managed sectors.

PARP Summary Report 2019

In this PARP Summary Report, BCFIRB has taken the information provided by each of the boards in their PARP reports submitted in June 2019 and summarized the information in the three main areas – sector performance targets, governance and quota management and movement.

BCFIRB prepared this Summary Report of all regulated agricultural sectors with the intention of providing a helpful resource for the agri-food industry, government, the boards and the public. We strongly encourage readers to review the individual board PARP and annual reports to learn more about board activities.

Although this Report may help inform readers, direct consultation with the appropriate regulatory authority is advised before making business or other decisions.

In closing, this Summary Report is intended to improve the consistency, effectiveness and transparency of the information collected and reported on by the boards.

Sector Performance Targets

As part of the PARP, BCFIRB asked the boards to confirm and report on their performance targets for the industry sectors they regulate. The boards' targets are important to establish and communicate the future direction and structure of B.C.'s regulated agriculture sectors.

Targets play a key role in supporting strategic decision-making and policy development by the boards, BCFIRB and government in the interests of agriculture and the public.

BCFIRB and the boards will review the reported sector performance targets in winter 2019. Some targets may be revised for 2020, given some boards are in the process of updating their strategic plans.

The following tables summarize BCFIRB's understanding of the targets identified by the boards and their reported status. For the purpose of this Summary Report, BCFIRB has only included sector targets that the boards specified in their PARP reports to BCFIRB.

Overall, the boards' targets reflect a broad focus, such as supply risk, international trade and inter-provincial competitiveness, and long-term interest to cooperate with other jurisdictions and with supply chain members.

Target status key:

-  Completed
-  In progress
-  To be started
- N/R Not reported

Supply Managed Sectors

B.C.'s supply management boards are granted a broad range of legislated powers to manage regulated agricultural commodities (i.e., chicken, eggs, cow's milk, broiler hatching eggs and turkey). These powers allow the boards to promote, regulate and control the production, transportation, packing, storing and marketing of the regulated commodities. Because of their powers, these boards play a major role in shaping the sectors they regulate, as reflected in their sector performance targets described on the following pages.



BC Broiler Hatching Egg Commission
(Hatching Egg Commission)

Cost of Production Update and Linkage Review and Pricing 

The Hatching Egg Commission is:

- Reviewing and updating how much it generally costs B.C. farmers to produce hatching eggs (cost of production);
- Addressing egg hatchery request for an increased margin (difference in price between what is paid to hatching egg producers by hatcheries for their chicks and the price chicken growers pay the hatcheries for the chicks);
- Working with the Chicken Board to update the formula that aligns the price hatching egg producers receive for their chicks with the price chicken growers are paid for their chicken.

Hatching egg producers use an Animal Care Program 

Canadian broiler hatching egg producers are committed to providing the highest level of animal care. To meet this commitment, the Hatching Egg Commission is implementing the Canadian Hatching Egg Producers (CHEP) Animal Care Program in B.C. The roll out of the program is complete, audits start in late August 2019.

Establish a Spiking Male Program 

Moving roosters between hatching egg farms risks spreading diseases which can threaten hatching egg production. Some of these diseases, such as Avian Influenza, can impact other poultry sectors (chicken, eggs and turkey). To reduce this risk, the Hatching Egg Commission is implementing a program to reduce or eliminate roosters being moved between farms.

Regulation of Asian Breeders 

Effective and strategic regulation of Silkie and Taiwanese hatching egg production (“Asian Breeders”) is part of the Hatching Egg Commission’s legislated responsibilities. Temporary chick-based quota was issued to the six Asian breeder producers in 2019 in the amount of 4.5 million chicks. The Hatching Egg Commission has included the Asian hatching egg sector as part of its strategic planning as of 2018, and will revisit the appropriate regulatory tools by fall 2019.

Manage growth of the hatching egg sector 

Increasing consumer demand for chicken is increasing chicken grower demand for chicks from hatching egg producers. The Hatching Egg Commission developed and launched the Growth Management Strategy to allow the industry and individual producers to grow, modernize and use an additional production opportunity to satisfy the growing consumer demand.

BC Farm Industry Review Board
Sector Performance Targets



BC Chicken Marketing Board
(Chicken Board)

Promote increased production and consumption of B.C. chicken 

The Chicken Board undertook several marketing activities to raise the profile of B.C. grown chicken (e.g., partnership with Seven Eleven stores) and specialty Asian chicken, challenge industry myths and improve communication with consumers.

Ensure the safety and care of chickens and chicken products 

The Chicken Board achieved (2018) and is committed to 100% audit compliance through the On Farm Safety Assurance Program, Animal Care Program and BC Biosecurity program.

Ensure a fair return to growers and competitiveness of processors 

The Chicken Board initiated the annual review of the pricing formula established in May 2017. A revised formula was implemented in quota period A-151 (commencing July 3, 2018), which was appealed by processors and growers. BCFIRB held appeal hearings in the fall of 2018 and a decision was released on May 16, 2019.

The Chicken Board and the Hatching Egg Commission reviewed and updated the Pricing Linkage Formula and the Cost of Production models for both broiler growers and hatching egg producers. The work on the Linkage Formula and Agreement will continue into 2019 and 2020. The objective is to ensure that broiler growers and hatching egg producers are receiving an equitable and reasonable return.

Ensure niche production and marketing opportunities in the chicken sector 

As a result of the 2013 success of the Chicken Board in establishing a separate national allocation for specialty production, the Chicken Board has continued to support a 16.6% growth in production over 2017. The Chicken Board supports regional production and marketing opportunities through its New Entrant Grower Program.

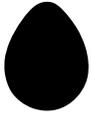
Achieve 100% production of B.C.'s share of national allocation 

The Chicken Board is responsible for helping meet domestic chicken demand. The Chicken Board does this by making sure B.C. growers all contribute to meeting B.C.'s production commitments using a variety of incentives and regulatory tools.

Achieve "Best in Class" Board governance and business operations 

The Chicken Board moved to digital communication with growers and continues to optimize its internal business operations by reviewing roles, responsibilities and the Board's Policy Manual.

BC Farm Industry Review Board
Sector Performance Targets



BC Egg Marketing Board
(Egg Board)

Increase consumers' trust in B.C. egg farmers by 4% (to be measured in 2019)



Build stakeholder trust through increasing Egg Board reputation as a reliable source of information by 5% by April 2019



The Egg Board identified the importance of public trust in food production. Research shows that the level of trust in B.C. egg farmers is lower than the national average (41% in B.C., 52% nationally). The Egg Board has developed a marketing plan to make the table egg industry transparent, increase trust between consumers and farmers and build the Egg Board's reputation as a reliable source of table egg industry information.

Provide leadership in animal care and biosecurity/food safety standards (average egg industry score of 97% or better on Start-Clean-Stay Clean and Animal Care Program)



The Egg Board's goal is to ensure that producers meet the highest standards of safety and quality of egg production. As of January 2019, all registered layer producers in B.C. were 100% compliant in all programs. Average scores for the Start-Clean Stay-Clean and Animal Care Program were 99.98% and 99.58% respectively. Together with the BC Egg Producers Association, the Egg Board has developed a specialty audit program that sets minimum standards of free-range production.

Maintain a quota utilization rate of 99.8% or better



Under supply management, the Egg Board, along with other egg boards across Canada, is responsible for meeting domestic demand for eggs. The Egg Board does this through making sure B.C. producers all contribute to meeting B.C.'s market needs by using incentives and regulatory tools to help ensure that all of B.C.'s quota is produced.

Maintain a total registered producer base of no fewer than 125 registered producers



It is important to B.C.'s egg industry to retain a diverse producer base in terms of size and production type. Tracking the number of producers year over year aims to assess farm consolidation and will help inform any policy and operational changes needed to retain a diverse producer base. This target is ongoing and requires constant monitoring.

Maintain 20% or more of total registered producers on Vancouver Island and in the Interior



Ensuring that at least 20% of registered producers operate on Vancouver Island and in the Interior, supports regional economic development through food security and the economic impact of egg production.



BC Egg Marketing Board Cont'd
(Egg Board)

Reduce the number of hens in conventional production systems by 5% per year to meet the 2032 Codes of Practice Deadline 

The Egg Board aims to achieve the highest level of hen welfare in the province and to reduce the number of hens in conventional production systems by 5% per year until 2032 to meet the Codes of Practice for the Care and Handling of Pullets and Laying Hens housing requirements deadline.

Develop a vision for the future of egg production and regional food sustainability in the province 

The Egg Board conducts needs assessments of egg production, egg sales and consumer preferences within each B.C. region. The Egg Board has requested flexibility on farm size for the new producers according to regional market needs.

Ensure fair producer pricing for enriched production by the end of 2019 

The Egg Board is working with other provincial egg boards on pricing changes as part of the national industry transition from conventional to enriched housing to reflect the increased production costs.

Ensure fair producer pricing for specialty eggs supplied to processors 

The Egg Board is working with the Egg Farmers of Canada and egg graders to develop a program where processors would receive specialty eggs as needed at a price that would reflect the extra production expense.

Maintain B.C.'s share in national production 

Maintaining B.C.'s share of national egg production is of benefit to B.C.'s egg industry and consumers.

Work on updates and changes to the Federal Provincial Agreement (FPA) 

Supply management depends on successful integration of federal and provincial authorities. The Federal Provincial Agreement (FPA) provides for the cooperative application of federal and provincial legislation in the table egg industry. The Egg Board continues to work with other provincial egg boards and Egg Farmers of Canada to update the FPA.

BC Farm Industry Review Board
Sector Performance Targets



BC Milk Marketing Board
(Milk Board)

Provide effective and efficient quota management policies and address the future of consolidation of farming ●

The Milk Board's redeveloped New Entrant Program is intended to support and provide industry growth and entry opportunities, for the benefit of the milk industry and the public.

Provide policies for B.C. producers and processors growth and innovation. Enable and maximize the Innovation Policy ●

Milk industry growth and innovation through increased production, efficiencies, new products and markets and in other areas benefits the dairy supply chain, farmers and consumers. The Milk Board focused on communicating and promoting new processor opportunities. For example, the Milk Board assisted in the start-up of the BC Artisanal Cheese Association.

Maintain high quality milk to meet consumer demands by leading the country in mandatory producer compliance of proAction modules ●

The Milk Board is responsible for the production and promotion of milk in B.C. Quality milk to meet consumer demand relies on establishing and enforcing production standards. The Milk Board has made the Dairy Farmers of Canada proAction program mandatory for all B.C. licenced dairy producers, effective January 1, 2018, resulting in 100% compliance. The proAction modules include animal welfare standards, milk quality standards and environmental standards.

Maintain sound financial and administrative management, ensure a culture of sound governance ●

The Milk Board collects levies from dairy producers for the purposes of delivering its regulatory responsibilities. It must be accountable to producers and the public for its financial management practices. The Milk Board measured its sound fiscal administration through error-free audit reports on its activity after the end of the fiscal year.

Effective strategic direction and optimize Milk Board effectiveness ●

The BC Milk Marketing Board Regulation requires the Milk Board to conduct a review of its regulatory authorities every three years to ensure the continued appropriateness and adequacy. The last review was accepted by BCFIRB.

Maintain effective policy communication and relations in the milk industry. Ensure accountability and principle-based approach to regulatory policy development ●

Maintaining a policy development process informed by consultation builds understanding and supports development of sound marketing policy. During the reporting period the Milk Board applied its consultative policy development process to develop recommendations on, and apply changes to quota management rules and its new entrant program.



BC Turkey Marketing Board
(Turkey Board)

Increase turkey consumption and increase consumer awareness of turkey products in Canada by 20% by 2024 

The Turkey Board is contributing to a national marketing campaign to increase turkey consumption in Canada.

Review and update turkey industry regulations for self-marketers by December 2019 

The Turkey Board is working with stakeholders on policy and regulation development to support access to processing for small scale turkey farmers that self-market niche products.

Maintain responsible pricing for producers and processors 

Feed costs and the Ontario producer price for turkey (high volume competitor) are key components impacting producer and processor returns. The Turkey Board continues to monitor and adjust its pricing practices to balance producer and processor business needs.

Provincially Regulated Sectors

B.C.'s boards managing provincially regulated commodities (i.e., cranberries, hogs and vegetables) are granted limited legislated powers. All three boards have powers related to marketing regulated commodities (i.e., how much product is sold). Only one board, the Vegetable Marketing Commission, is granted the authority to also regulate production (i.e., how much volume is grown). Because of these powers, these boards have an important role in shaping the sectors they regulate, as reflected in their sector performance targets.



BC Cranberry Marketing Commission (Cranberry Commission)

Increase aggregate production of cranberries in 2018 ●

Production volume is a reflection of the industry's overall economic wellbeing and serves as baseline data for future production comparison. The Cranberry Commission reports a 57% increase in cranberry production in 2018 over 2017. Variable weather conditions at optimal times of the cranberries' growing season poses a major risk for growing cranberries.

Yield per acre over number of planted acres ●

This indicator measures the volume of cranberries produced on a planted acre per year. The Cranberry Commission reports increase of yield by 57.6% in 2018 compared to 2017. Yields in 2020-22 might be lower, because it takes time for newly planted bogs to become productive.

Number of education sessions ●

Access to information supports growers in making best management decisions for their farms and contributes to a thriving, sustainable cranberry industry. The Cranberry Commission organized 3 cranberry-focused education events in 2018, distributed quarterly newsletters, updated its web site and encouraged growers to attend professional development seminars.

Number of cranberry industry research projects coordinated in part with the Cranberry Commission ●

The Cranberry Commission and the industry identified the need for on-going research as critical to the long-term viability of the cranberry industry. Cranberry Commission was involved with 4 research projects in 2018.

All growers and licensed producer-vendors are in compliance with a pest management program in 2018 ●

The Cranberry Commission requires all licensed agencies to ensure their growers are in compliance with a pest management program annually. Producer-vendors must verify participation with the Cranberry Commission.



BC Hog Marketing Commission
(Hog Commission)

Education sessions attended by BC Pork's Chairs, directors, member producers



Access to information supports growers in making best management decisions for their farms and contributes to a thriving, sustainable hog industry.

The Hog Commission set aside funds to encourage B.C. producers to attend conferences in North America.

An outbreak of Porcine Epidemic Diarrhea or African Swine Fever would severely disrupt the B.C. pork sector and require other activities such as education be set aside.

Ensure that all B.C. hog producers fully comply with the national Canadian Pork Excellence (CPE) platform by 2021



Programs that support consistent product quality through on-farm food safety, animal care, and traceability standards aid farmers in securing markets for their hogs to the benefit of farmers and the hog industry.

An outbreak of Porcine Epidemic Diarrhea or African Swine Fever would severely disrupt the B.C. pork sector and require other activities such as CPE compliance be set aside.

2018 Alberta hog farmers motion to refuse to transition to CPE without a \$2 per hog increase in price to cover their costs. As CPE is a national program, if provinces start to opt out, the initiative may fail. The Canadian Pork Council is working on project to look at developing a Canadian price for hogs (Canadian hog prices are currently based on US prices).

Continuous decrease in hog prices could lead to the increase in B.C. producers exiting the industry and the lack of interest from new farmers to enter the hog industry, and the increase of imports from other provinces.



BC Vegetable Marketing Commission
(Vegetable Commission)

To be developed



The Vegetable Commission is in the process of rebuilding a vision and strategic plan for the B.C. vegetable industry. Developing sector performance targets will be a key part of the strategic planning outcomes.

Governance

Effective, strategic and accountable delivery of legislated regulatory responsibilities by the commodity boards requires good governance and sound decision-making.

The governance measures detailed in this Summary Report were developed by BCFIRB, in consultation with the boards, to assess and demonstrate the establishment and use of good governance tools and sound decision-making.

BCFIRB and the boards will review the governance measures in winter 2019 for effectiveness, and they may be revised for the PARP reports to be submitted in 2020.

All boards generally demonstrated that they are following regulatory requirements, using sound decision-making practices, and are using, or are in the process of adopting, good governance tools. The majority of boards regularly seek feedback from their stakeholders and all boards demonstrate use of the SAFETI principles¹ in decision-making. BCFIRB will follow up with the boards in winter 2019 on good governance tools and related processes that were not reported on or yet to be put in place.

The following tables summarize BCFIRB's understanding of board responses to the governance measures, including their reported status. BCFIRB did not independently verify the reported status and is summarizing the information provided for purposes of this Summary Report.

TABLE 1 Governance Tools and Practice

TABLE 2 Financial Accountability

TABLE 3 Stakeholder Consultation

TABLE 4 Decision-making

Target status key:

-  Reported as met
-  Reported as in progress, partially met or was partially reported
-  Not reported or not fully reported but confirmed present by BCFIRB
- N/R** Not reported
- N/A** Not applicable in reporting period

¹ Strategic Accountable Fair Effective Transparent Inclusive.

BC Farm Industry Review Board
Governance

TABLE 1 Governance Tools and Practice

Summary of Measure	Commodity Board Reported Status							
	Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
BCFIRB approved election rules ²	●	●	●	●	●	●	●	●
Conflict of Interest and Code of Conduct policies up to date and communicated	●	●	●	●	●	●	●	●
Member and staff orientation and training	●	●	●	●	●	●	●	●
Strategic Plan	●	●	●	●	●	●	●	◐
Annual Report	●	●	●	●	●	●	●	●
Board performance evaluation	●	●	●	●	◐	●	●	N/R
Rules, operation policies & governance policies up to date and <u>publically accessible</u> ³	◐	●	●	●	◐	◐	◐	◐
Copies of all minutes, orders, reports, rules and regulations forwarded to BCFIRB as they are made ⁴	●	●	●	●	●	●	●	◐

² Required by commodity board legislation

³ Whether available on website

⁴ Required by s. 3(a) of the Natural Products Marketing (BC) Act Regulations

BC Farm Industry Review Board
Governance

TABLE 2 Financial Accountability

Summary of Measure	Commodity Board Reported Status							
	Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Audited financial statements	●	●	●	●	●	●	●	●
Approved board member remuneration and internal financial policies and controls in place and published	N/R	●	◐	●	◐	●	●	●
Financial accountability frameworks with organizations receiving funding to carry out delegated legislative responsibilities	●	●	●	●	N/R	●	●	◐

TABLE 3 Stakeholder Consultation

Summary of Measure	Commodity Board Reported Status							
	Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Assessment of stakeholder experience with board operations	N/R	●	N/R	●	N/R	●	●	◐
Stakeholder feedback actioned where appropriate	●	●	●	●	N/R	●	●	●
Consultation on initiatives and issues (i.e., producers, supply chain members, provincial and national organizations, BCIFRB, Ministry of Agriculture) as appropriate	●	●	●	●	●	●	●	◐

BC Farm Industry Review Board
Governance

TABLE 4 Decision-making

Summary of Measure	Commodity Board Reported Status							
	Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Major decisions are transparent and include rationale and description of process			N/A					
Use of the SAFETI principles in decision-making			N/R					
Quorum and management of conflict of interest via documentation								

Quota Management and Movement

In consultation with the Broiler Hatching Egg Commission, the Chicken Board, the Egg Board, the Milk Board and the Turkey Board, BCFIRB identified quota management and movement data relevant to understanding the structure and status of B.C.'s supply managed sectors.

Monitoring the current structure and status of these sectors plays a key role in informing strategic decision-making and policy development by the boards, BCFIRB, government and industry, in the interests of agriculture and the public.

BCFIRB and the boards will review the data collected in late 2019 for effectiveness. Quota data collection may be revised and clarified in the reports to be submitted to BCFIRB in 2020.

Quota

Quota is a licence to produce. It is the tool established in provincial regulation to manage production volumes of supply managed agricultural commodities in B.C. (i.e., broiler hatching egg, chicken, cow's milk, turkey, eggs). Provincial regulations also create and provide the powers to the B.C. boards to regulate these sectors.

How much quota a B.C. producer holds determines the volume of regulated commodity that a producer can grow over a fixed time period.

Producers who hold quota benefit from an assured market for their commodity and a guaranteed minimum price. With this privilege comes responsibilities set out in regulations and board rules.

As the amount of quota available is limited, it can be difficult for new people to enter the supply managed sectors without the support of board new entrant programs,⁵ small lot permit programs and personal consumption exemptions.

Setting and managing national and provincial production volumes

National agencies, including the Chicken Farmers of Canada, Canadian Hatching Egg Producers, Turkey Farmers of Canada, Egg Farmers of Canada, determine total Canadian demand for their supply managed commodities. In dairy, the Canadian Dairy Commission determines market demand for industrial milk⁶ and provincial milk boards determine provincial demand for fluid milk⁷.

For all commodities, federal-provincial agreements establish how much production is assigned to each province to meet total domestic demand.

B.C.'s boards manage quota (i.e., distribute quota, retract quota) to ensure B.C.'s assigned production commitment is met.

⁵ Successful program applicants receive quota at no cost from the commodity board.

⁶ Milk used for making processed items such as skim milk powder.

⁷ Milk used for making fluid milk products like 2% or chocolate milk.

BC Farm Industry Review Board
Quota Management and Movement

B.C. Quota Facts

Boards must manage quota in accord with the *Natural Products Marketing (BC) Act*, the regulations establishing their authorities, and BCFIRB directions.

- Quota is issued to B.C. producers by supply management boards at no cost.
- Quota remains the property of the boards, even though it is ‘held’ by producers.
- Quota can be transferred between producers.
- When quota is transferred between producers, it acquires market value in the private producer marketplace.

Small volume production without quota

Small volumes of supply managed commodities can be grown in B.C. without quota.

Personal consumption: Supply managed commodities can be grown for personal consumption so long as the volume is less than the specified amount. For example, up to 200 chickens a year can be grown for personal consumption. There are no personal exemption volumes set for cows’ milk.

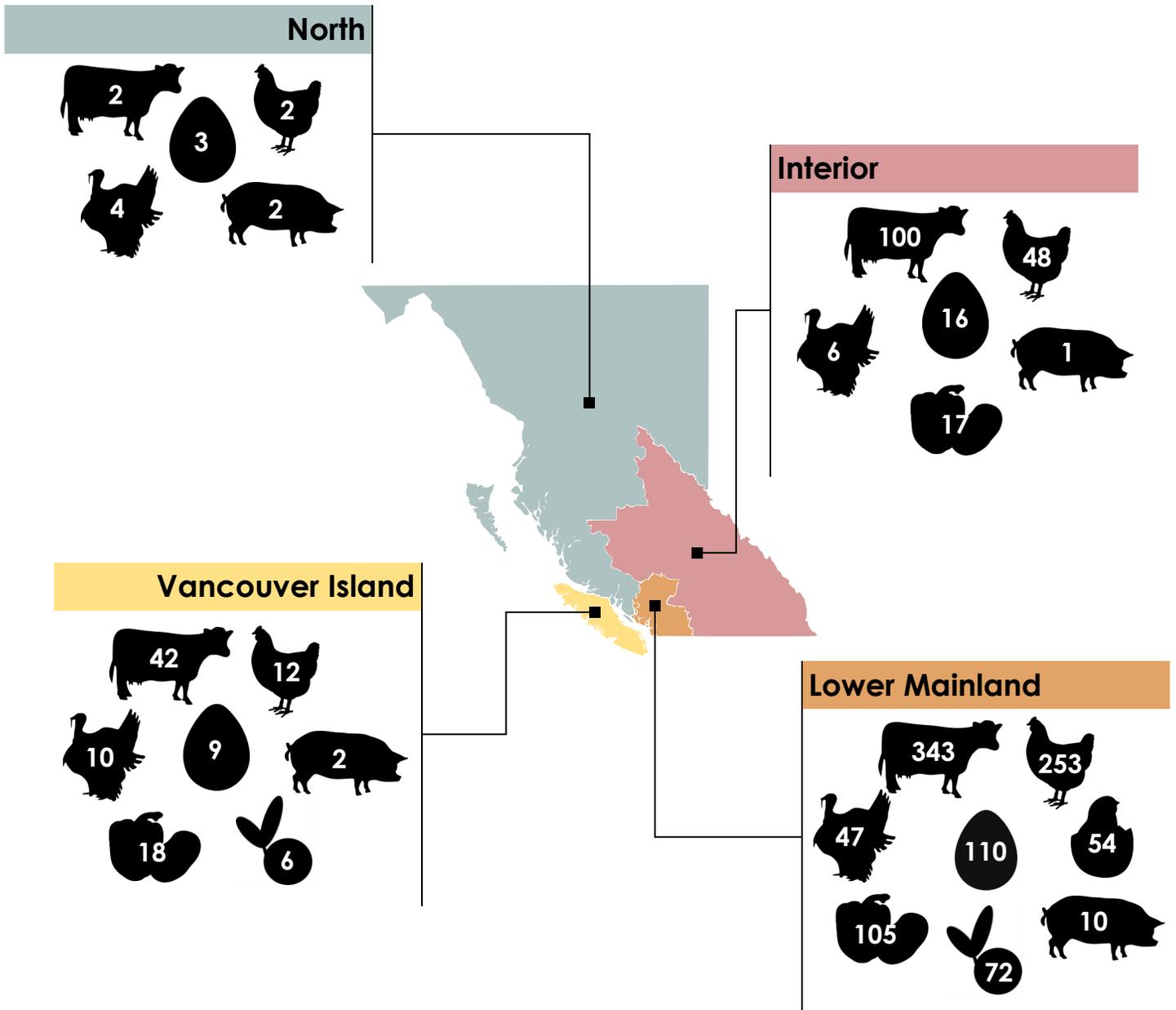
Small Lot Permit: Supply managed commodities, with the exception of cows’ milk, can be grown for sale so long as the volume is less than a specified amount. For example, up to 300 turkeys per year can be grown for sale at places like a farmers’ market sale or to an independent butcher without quota. Small scale producers are asked by B.C.’s supply management boards to register for a permit. The permit system helps support activities critical to a safe, dependable supply of B.C. food such as disease tracking and food safety.

Quota Unit and Production Key

Commodity	Quota Unit	Production reported in:
Broiler Hatching Eggs	1 breeding hen / 2 years	Number of hatching eggs
Chicken	1 kg live weight / 8 weeks	kg live weight
Eggs	1 laying hen / 1 year	Dozens of eggs
Milk	1 kg butterfat / day (CDQ)	kg of butterfat
Turkey	1 kg live weight / 1 year	kg live weight

BC Farm Industry Review Board
Quota Management and Movement

Licensed Producers of all Regulated Commodities in B.C., 2018



Total Licensed Producers of all Regulated Commodities



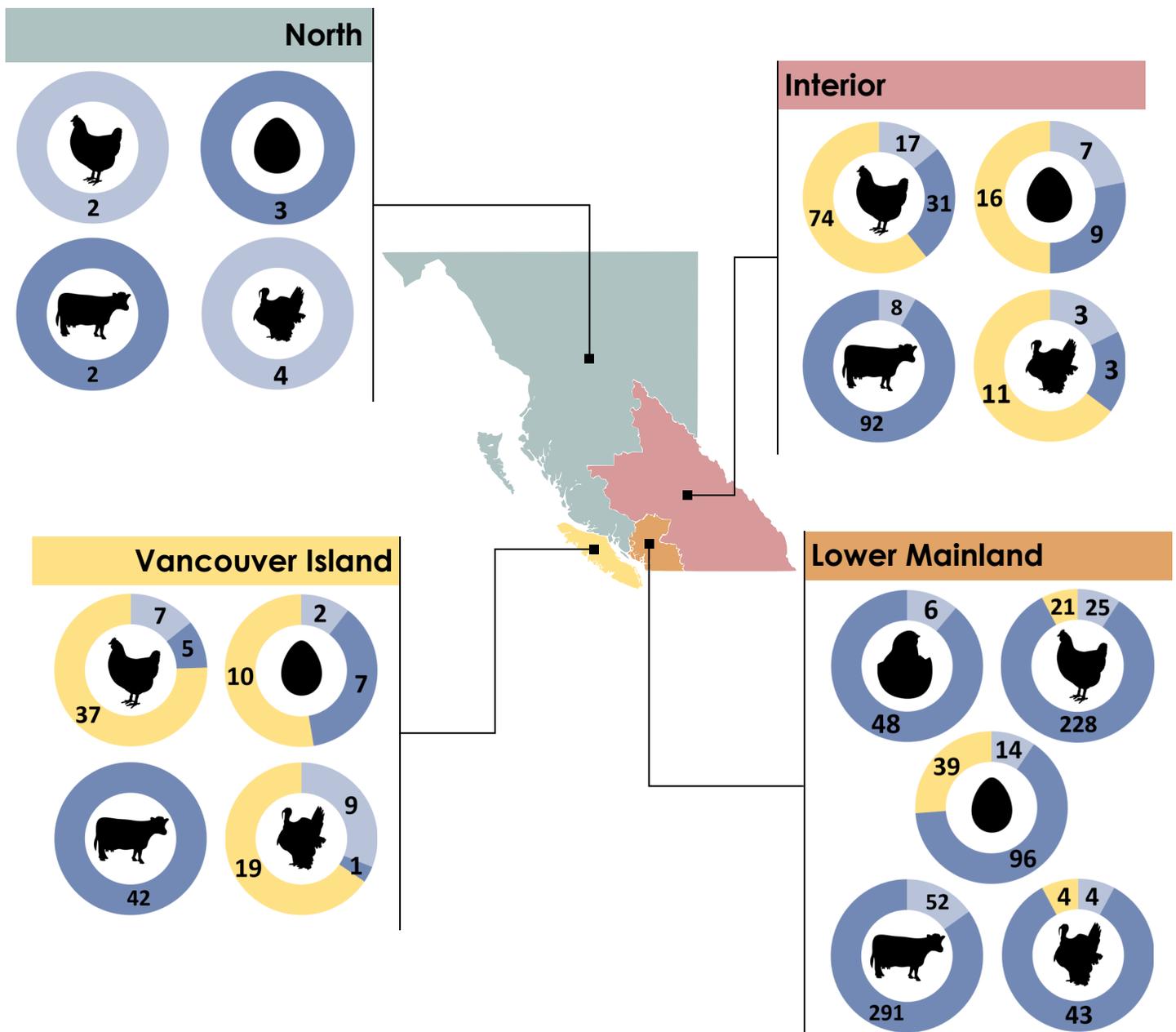
Total Licensed Producers 1294

Supply Managed Producers in B.C., 2018

Each circle graph represents the number of supply managed producers by type and region.

- **New entrant producers** hold quota and include any producer entering the industry within the last 10 years (e.g., New Entrant program, succession planning, quota purchase, etc.).
- **Established producers** hold quota and have been in the industry for 10 years or more.
- **Small lot producers** are small scale farms operating under a permit issued by a commodity board and do not hold quota.

* The Milk Board does not issue small lot permits, as quota is required for all milk produced for sale in B.C.

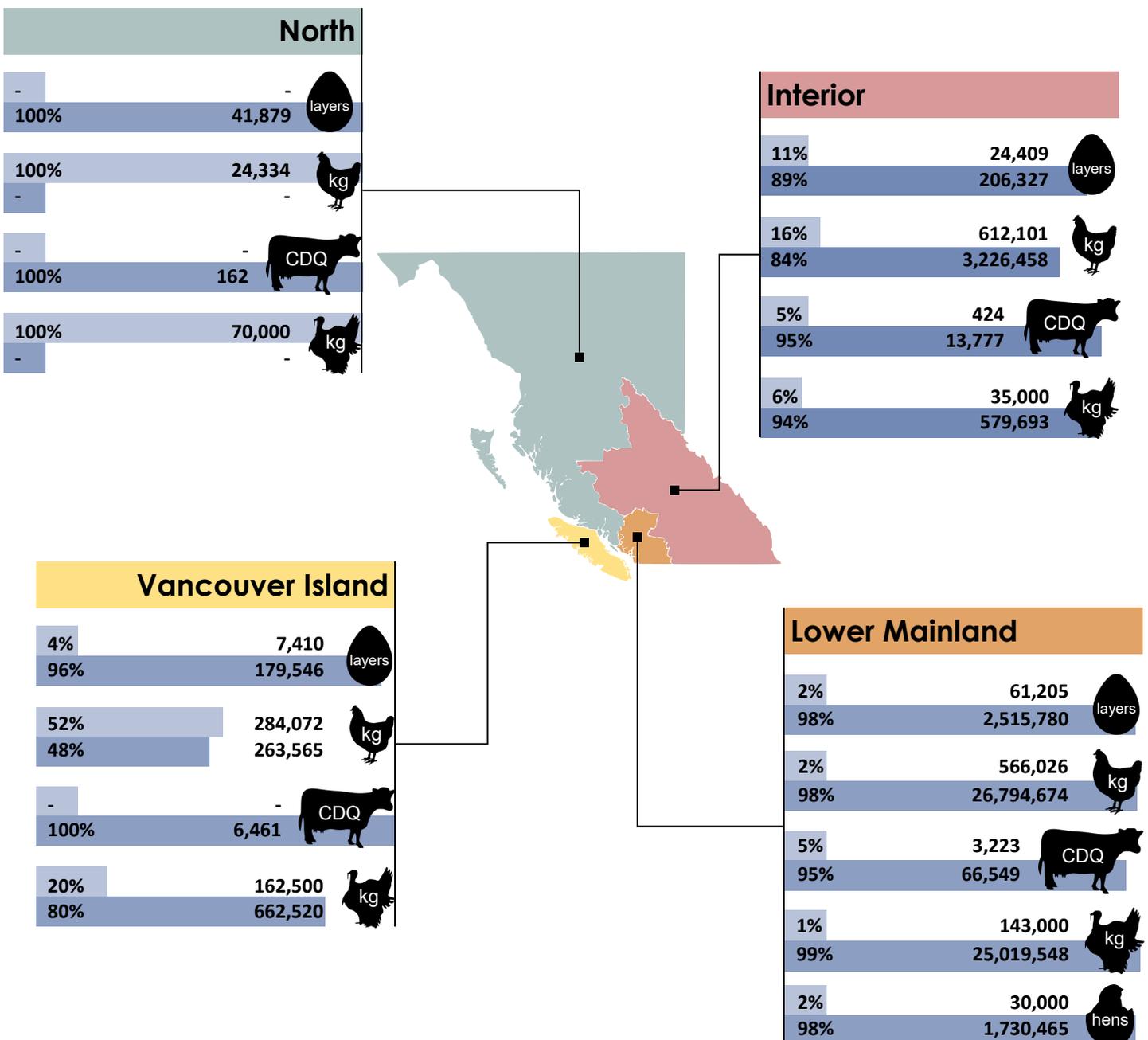


Quota Holdings in B.C., 2018

Each chart represents the proportion and volume of established and new entrant quota holdings by commodity and region.

- **New entrant producers** can include any producer entering the industry within the last 10 years (e.g., New Entrant program, succession planning, quota purchase, etc.). Turkey new entrant statistics include producers entering since 2006.
- **Established producers** have been in the industry for 10 years or more.

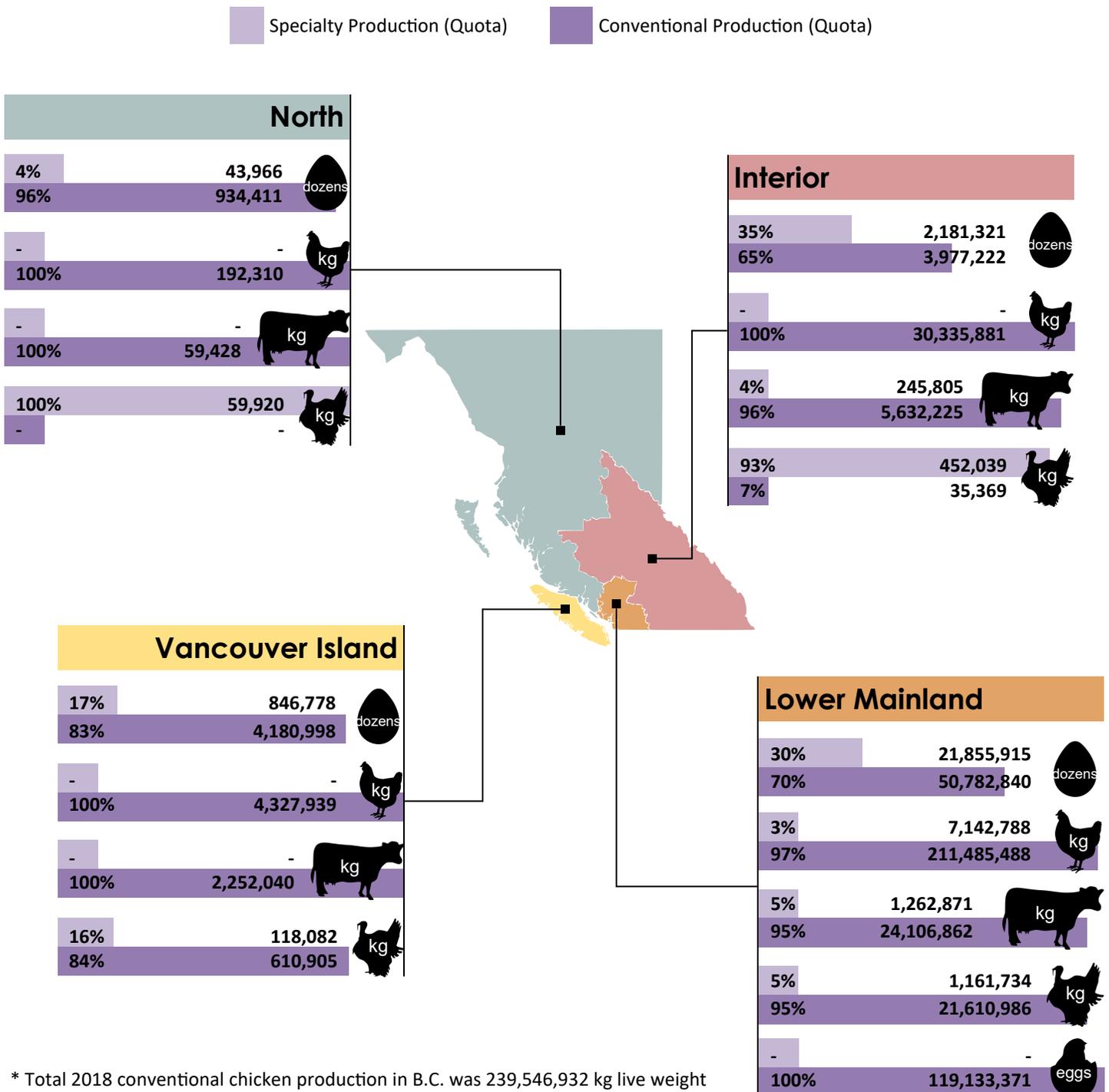
 New Entrant Producers  Established Producers



Quota Production in B.C., 2018

Each chart represents the proportion and volume of conventional and specialty quota production by commodity and region. Conventional production generally covers mainstream production methods and standard breeds of animals. Specialty production covers unique production methods or breeds, as well as organic production. In chicken, organic production is done under mainstream quota.

- Temporary specialty hatching egg quota will be issued in 2019 and reported on in 2020.



* Total 2018 conventional chicken production in B.C. was 239,546,932 kg live weight

BC Farm Industry Review Board
Quota Management and Movement

Growth Quota Distribution in B.C., 2018

The following tables set out how much new quota was distributed to B.C. producers by boards during the reporting period.

The Milk and Egg Boards issue and retract quota to ensure provincial production volume requirements are met. Producers must produce the amount of product specified by the amount of quota they hold.



BC Egg Marketing Board Jan 1 - Dec 31, 2018

- The Egg Board issued 2.58% more quota to qualifying B.C. producers for a total of 97,885 units (layers) as follows:

		Established		New Entrant		Total	
		Producers	Quota	Producers	Quota	Producers	Quota
By Producer Size	Small	21	15,825	20	7,069	41	22,894
	Medium	70	53,939	3	1,128	73	55,067
	Large	24	19,924	0	-	24	19,924
	Total	115	89,688	23	8,197	138	97,885
By Region	Lower Mainland	96	76,172	14	5,100	110	81,272
	Vancouver Island	7	5,645	2	703	9	6,348
	Interior	12	7,871	7	2,394	19	10,265
	North	0	-	0	-	0	-
	Total	115	89,688	23	8,197	138	97,885



BC Milk Marketing Board Aug 1, 2017 - July 31, 2018

- The Milk Marketing Board issued 4% more quota to qualifying B.C. producers for a total of 3,443 units (CDQ) as follows:

		Established		New Entrant		Total	
		Producers	Quota	Producers	Quota	Producers	Quota
By Producer Size	Small	111	241	48	75	159	316
	Medium	165	801	12	64	177	865
	Large	151	2,262	-	-	151	2,262
	Total	427	3,304	60	139	487	3,443
By Region	Lower Mainland	291	2,526	52	123	343	2,649
	Vancouver Island	42	249	-	-	42	249
	Interior	92	523	8	16	100	539
	North	2	6	-	-	2	6
	Total	427	3,304	60	139	487	3,443

BC Farm Industry Review Board
Quota Management and Movement

Growth Quota Distribution in B.C., 2018 cont'd

The Chicken, Broiler Hatching Egg and Turkey Boards tell producers what percentage of their quota holdings to produce to ensure the total provincial production volume requirements are met. If B.C. production requirements increase to where producers are regularly producing over 100% of the quota they hold, the board may issue more quota.



BC Broiler Hatching Egg Commission Jan 1 - Dec 31, 2018

- Utilization was adjusted to 100% for placements beginning on or after July 1, 2017, and to 106% for placements beginning on or after July 1, 2018.



BC Chicken Marketing Board Jan 21, 2018 - Dec 22, 2018

- Chicken growers used over 100% of their quota.
- 20% more quota is scheduled to be issued to producers in 2020.



BC Turkey Marketing Board April 29, 2018 - April 27, 2019

- Turkey producers used 85.6% of their quota.
- No quota is scheduled to be issued at this time.

BC Farm Industry Review Board
Quota Management and Movement

Quota Movement in B.C., 2018

The following tables set out the number of quota transfers between B.C. producers that took place in each reporting period, and the total amount of quota transferred. By BCFIRB direction, some quota transfers result in a portion of quota being returned to the board (“transfer assessment”). The tables below include how much quota was subject to assessment and the total amount of quota returned to the board during the reporting period.



BC Broiler Hatching Egg Commission Jan 1 - Dec 31, 2018

of all transfers: 16 **Total volume of transfers:** 225,793 quota units (breeding hens)
Exempt from assessment: 193,993 **Subject to assessment:** 31,800 **Total assessment collected:** 1,590

Volume of Quota transfer by Size, and Producer Type

	Small	Medium	Large	TOTAL	Established	New Entrant	TOTAL
Transfer From	4,500	98,428	122,865	225,793	225,793	-	225,793
Transfer To	27,800	77,128	120,865	225,793	201,793	24,000	225,793

- Note:
- All transfers occurred in the Lower Mainland.
 - The 16 transfers included business reorganizations and New Producer Program distribution.



BC Chicken Marketing Board Jan 21, 2018 - Dec 22, 2018

of all transfers: 43 **Total volume of transfers:** 1,894,539 quota units (kg)
Exempt from assessment: 0 **Subject to assessment:** 1,894,539 **Total assessment collected:** 113,088

- Note:
- The Chicken Board calculates a Deemed Assessment on all quota transfers to fund their NEG program
 - Chicken Board policies restrict the transfer of quota out of the Interior and off Vancouver Island.
 - The number of transfers by region was not reported.



BC Egg Marketing Board Jan 1 - Dec 31, 2018

of all transfers: 30 **Total volume of transfers:** 35,231 quota units (layer hens)
Exempt from assessment: 25,094 **Subject to assessment:** 10,137 **Total assessment collected:** 1,230

Volume of Quota Transfer by Production Type

	Conventional	Enriched	Free Run	Free Range	Organic	Mixed	Assessed	TOTAL
Transfer From	22,957	-	-	-	12,274	-	-	35,231
Transfer To	15,880	4,192	6,600	1,076	5,117	646	1,230	34,741

- Note:
- The number of transfers by region was not reported (no transfers occurred on Vancouver Island).

BC Farm Industry Review Board
Quota Management and Movement

Quota Movement in B.C., 2018 cont'd

The following tables set out the number of quota transfers between B.C. producers that took place in each reporting period, and the total amount of quota transferred. By BCFIRB direction, some quota transfers result in a portion of quota being returned to the board (“transfer assessment”). The tables below include how much quota was subject to assessment and the total amount of quota returned to the board during the reporting period.



BC Milk Marketing Board Aug 1, 2017 - July 31, 2018

of all transfers: *n/r* **Total volume of transfers:** 4,102 quota units (CDQ)
Exempt from assessment: *n/r* **Subject to assessment:** *n/r* **Total assessment collected:** *n/r*

Volume of Quota Transfer by Region

	Lower Mainland	Vancouver Island	Interior	North	TOTAL
Transfer From	3,296	240	557	-	4,093
Transfer To	3,658	25	419	-	4,102

Note: • The number of transfers by region was not reported.



BC Turkey Marketing Board April 29, 2018 - April 27, 2019

of all transfers: 3 **Total volume of transfers:** 52,500
Exempt from assessment: 35,000 **Subject to assessment:** 17,500 **Total assessment collected:** 10,500

Note: • One transfer occurred on Vancouver Island; one occurred in the Lower mainland; and one occurred in the Interior.

Conclusion

Overall, BCFIRB found the information provided by the boards to be useful and informative.

BCFIRB expects that boards, as the first instance regulators of their sectors, will continue to review and update their performance targets based on their strategic plans. BCFIRB will be discussing the challenges of setting and achieving effective and strategic sector performance targets in a rapidly changing environment with the boards later in 2019. BCFIRB looks forward to having a greater understanding of each board's vision for their sector and understanding how they intend to reach those goals over time.

All boards generally demonstrated that they are following regulatory requirements, using sound decision-making practices, and are using, or are in the process of adopting, good governance tools. BCFIRB will follow up with the boards on tools and processes that were not reported on or yet to be put in place.

Finally, the information enabled BCFIRB to summarize the highlights of quota distribution and production across the five supply managed sectors in B.C.

Going forward, BCFIRB will have ongoing discussions with the boards in the spirit of continuous improvement. We will discuss the PARP process and determine what may be helpful to streamline or improve future reporting cycles, with the next reports expected from the boards in June of 2020.

References

Commodity Board 2019 PARP Reports

Individual commodity board reports can be found on BCFIRB's website:

[BC Hatching Egg Commission. \(2019\). Public Accountability Report](#)

[BC Chicken Marketing Board. \(2019\). Public Accountability Report](#)

[BC Cranberry Marketing Commission. \(2019\). Public Accountability and Reporting \(PARP\) Project](#)

[BC Egg Marketing Board. \(2019\). BC Egg's 2018 Public Accountability Report](#)

[BC Hog Marketing Commission. \(2019\). Public Accountability and Reporting Project](#)

[BC Milk Marketing Board. \(2019\). Public Accountability Report, August 1, 2017 – July 31, 2018](#)

[BC Turkey Marketing Board. \(2019\). Public Accountability Reporting Project](#)

[BC Vegetable Marketing Commission. \(2019\). Public Accountability Reporting \(PARP\) Project.](#)

Further Information

BC Hatching Egg Commission: www.bcbhec.com

BC Chicken Marketing Board: www.bcchicken.ca

BC Cranberry Marketing Commission: www.bccranberries.com

BC Egg Marketing Board: www.bcegg.com

BC Hog Marketing Commission: www.bcpork.ca

BC Milk Marketing Board: www.bcmilk.com

BC Turkey Marketing Board: www.bcturkey.com

BC Vegetable Marketing Commission: www.bcveg.com



PARP
Appendices

Contents

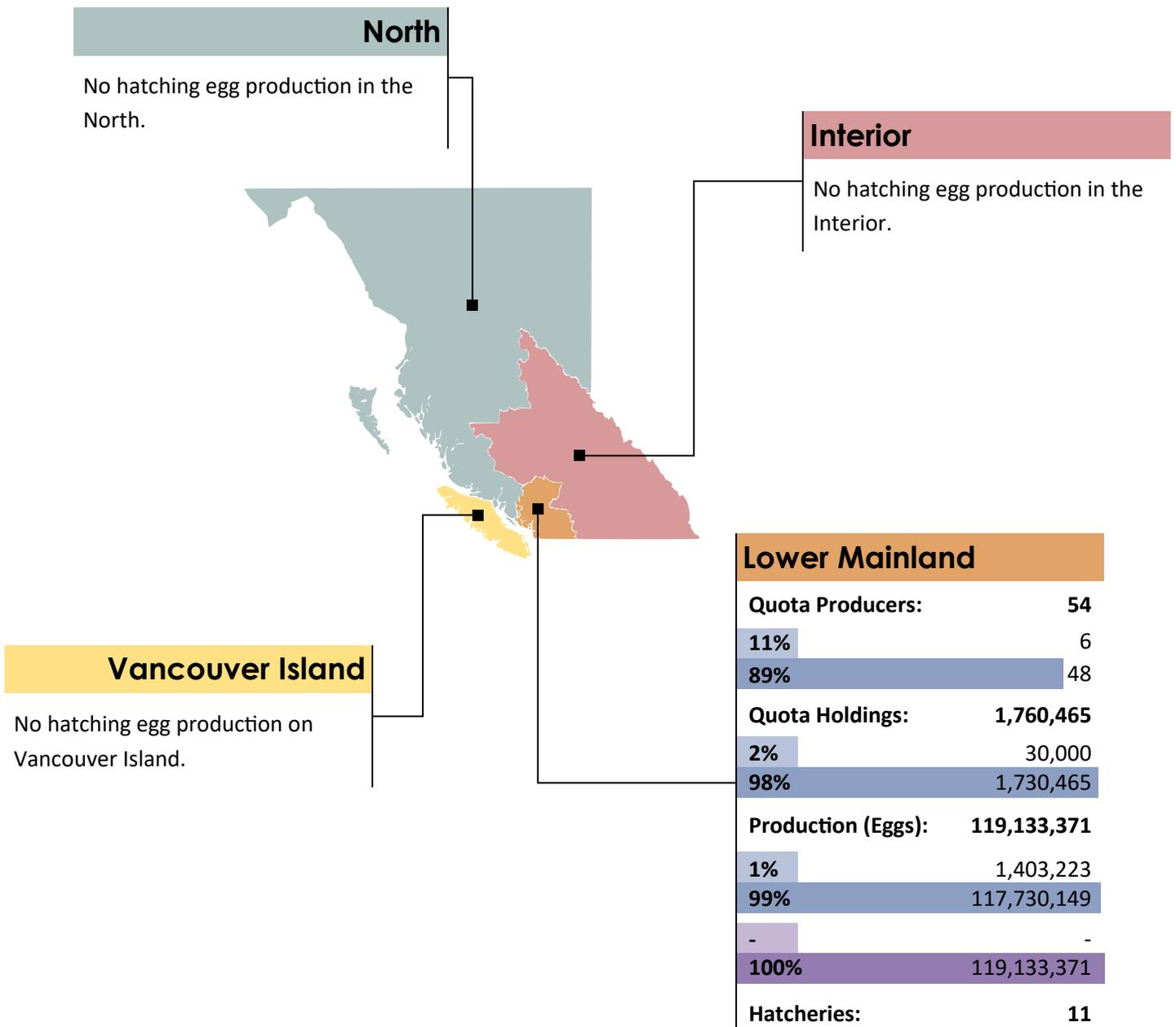
Appendix 1 – BC Broiler Hatching Egg Commission 32
Appendix 2 – BC Chicken Marketing Board 34
Appendix 3 – BC Egg Marketing Board 36
Appendix 4 – BC Milk Marketing Board..... 38
Appendix 5 – BC Turkey Marketing Board 40
Appendix 6 – BC Cranberry Marketing Commission..... 42
Appendix 7 – BC Hog Marketing Commission 43
Appendix 8 – BC Vegetable Marketing Commission..... 44



Appendix 1 - BC Broiler Hatching Egg Commission

2018 Sector Overview

There are six Asian breeder producers in production. In 2019, 4.5 million units of temporary quota were issued, and will be reported on in 2020.





Appendix 1 - BC Broiler Hatching Egg Commission

Production & Statistics

These tables use Hatching Egg Board 2019 PARP report statistics. Asian breeder specialty production statistics are not included in this reporting period.

Producer Size

		# of Producers		Quota Held		Production (Eggs)	
Small	(<25,000 hens/cycle)	19	35%	279,765	16%	18,136,243	15%
Medium	(25,000 - 49,999 hens/cycle)	27	50%	965,486	55%	64,606,171	54%
Large	(>50,000 hens/cycle)	8	15%	515,214	29%	36,390,958	31%
Total		54		1,760,465		119,133,372	

Producer Type

		# of Producers		Quota Held		Production (Eggs)	
Established Producers		48	89%	1,730,465	98%	117,730,149	99%
New Entrants		6	11%	30,000	2%	1,403,223	1%
Total		54		1,760,465		119,133,372	

Region

		# of Producers		Quota Held		Production (Eggs)	
Lower Mainland		54	100%	1,760,465	100%	119,133,371	100%
Vancouver Island		0	-	-	-	-	-
Interior		0	-	-	-	-	-
North		0	-	-	-	-	-
Total		54		1,760,465		119,133,371	

Production Type

		# of Producers		Quota Held		Production (Eggs)	
Mainstream		54	100%	1,760,465	100%	119,133,371	100%
Specialty - Asian Breeder		-	-	-	-	-	-
Total		54		1,760,465		119,133,371	

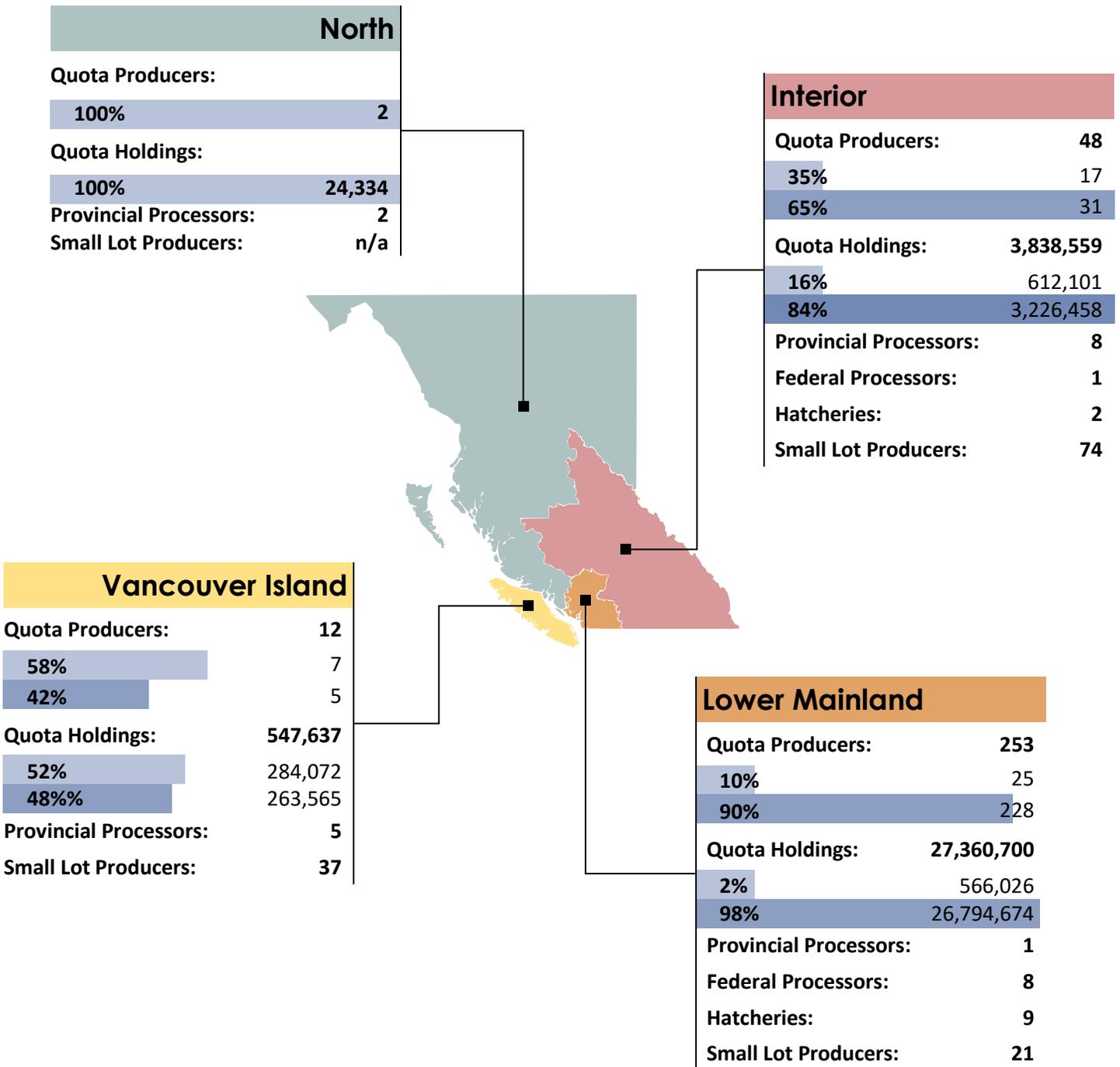
New Entrants to the Sector

- 1 through New Producer Program
- 2 through purchasing quota



Appendix 2 - BC Chicken Marketing Board

2018 Sector Overview





Appendix 2 - BC Chicken Marketing Board

Production & Statistics

These tables use Chicken Board 2019 PARP report statistics.

Producer Size

of Producers

Small	(<50,000 kg)	97	31%
Medium	(50,000 - 300,000 kg)	204	65%
Large	(>300,000 kg)	14	4%
Total		315	

Producer Type

of Producers

Quota Held

Established Producers	264	84%	30,309,031	95%
New Entrants	51	16%	1,462,199	5%
Total	315		31,771,230	

Region

of Producers

Quota Held

Production (kg)

Lower Mainland	253	80%	27,360,700	86%	218,628,276	89%
Vancouver Island	12	4%	547,637	2%	4,327,939	2%
Interior	48	15%	3,838,559	12%	30,335,881	12%
North	2	1%	24,334	0%	192,310	0%
Total	315		31,771,230		253,484,406	

Production Type

of Producers

Quota Held

Production (kg)

Mainstream	279	89%	31,170,904	98%	246,341,618	97%
Specialty	36	11%	600,326	2%	7,142,788	3%
Total	315		31,771,230		253,484,406	

New Entrants to the Sector

- 1 mainstream grower started through the New Entrant Grower Program (5 to start in 2020)
- Due to increasing the entry level of quota granted to future and existing new entrant growers by approximately 45% (announced in 2017), the Chicken Board chose to defer starting additional new entrants for 3 years (including 2018).



Appendix 3 - BC Egg Marketing Board

2018 Sector Overview

■ Established Producers
 ■ New Entrants
 ■ Conventional Production
 ■ Specialty Production

North

Quota Producers:	
100%	3
Quota Holdings:	
100%	41,879
Production (dozen eggs):	978,377
100%	978,377
4%	43,966
96%	934,411

Interior

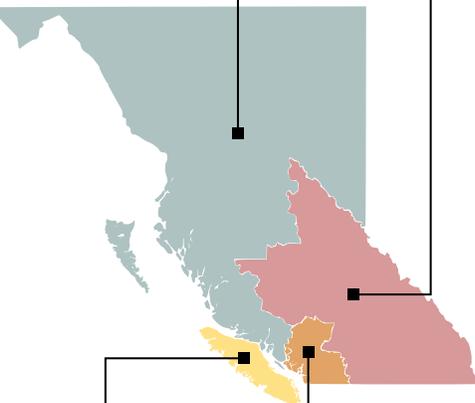
Quota Producers:	16
44%	7
56%	9
Quota Holdings:	230,736
11%	24,409
89%	206,327
Production (dozen eggs):	6,158,543
8%	500,118
92%	5,658,425
35%	2,181,321
65%	3,977,222
Commercial Graders:	5
Small Lot Graders:	9
Small Lot Producers:	16

Vancouver Island

Quota Producers:	9
22%	2
78%	7
Quota Holdings:	186,956
4%	7,410
96%	179,546
Production (dozen eggs):	5,027,776
2%	123,547
98%	4,904,229
17%	846,778
83%	4,180,998
Commercial Graders:	2
Small Lot Graders:	2
Small Lot Producers:	10

Lower Mainland

Quota Producers:	110
13%	14
87%	96
Quota Holdings:	2,576,985
2%	61,205
98%	2,515,780
Production (dozen eggs):	72,638,755
2%	1,721,948
98%	70,916,807
29%	21,177,789
71%	51,460,966
Commercial Graders:	2
Small Lot Graders:	1
Small Lot Producers:	39





Appendix 3 - BC Egg Marketing Board

Production & Statistics

These tables use Egg Board 2019 PARP report statistics.

Producer Size

		# of Producers		Quota Held		Production (Dozen Eggs)	
Small	(<6,137 Quota)	34	25%	132,623	4%	3,477,982	4%
Medium	(6, 138—27,302 Quota)	73	53%	1,185,518	39%	33,331,369	39%
Large	(>27,303 Quota)	31	22%	1,718,415	57%	47,994,100	57%
Total		138		3,036,556		84,803,451	

Producer Type

		# of Producers		Quota Held		Production (Dozen Eggs)	
Established Producers		115	83%	2,943,532	97%	82,457,838	97%
New Entrants		23	17%	93,024	3%	2,345,613	3%
Total		138		3,036,556		84,803,451	

Region

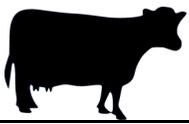
		# of Producers		Quota Held		Production (Dozen Eggs)	
Lower Mainland		110	80%	2,576,985	85%	72,638,755	86%
Vancouver Island		9	7%	186,956	6%	5,027,776	6%
Interior		16	12%	230,736	8%	6,158,543	7%
North		3	2%	41,879	1%	978,377	1%
Total		138		3,036,556		84,803,451	

Production Type

		# of Producers		Quota Held		Production (Dozen Eggs)	
Conventional		61	44%	2,098,936	69%	59,875,471	71%
Enriched		5	4%	194,585	6%	4,150,264	5%
Free Run		21	15%	238,678	8%	7,378,591	9%
Free Range		29	21%	264,112	9%	6,760,487	8%
Organic		22	16%	240,245	8%	6,638,637	8%
Total		138		3,036,556		84,803,450	

New Entrants to the Sector

- 8 through New Producer Program
- 2 through Succession Planning
- 1 through purchasing quota on the Quota Exchange



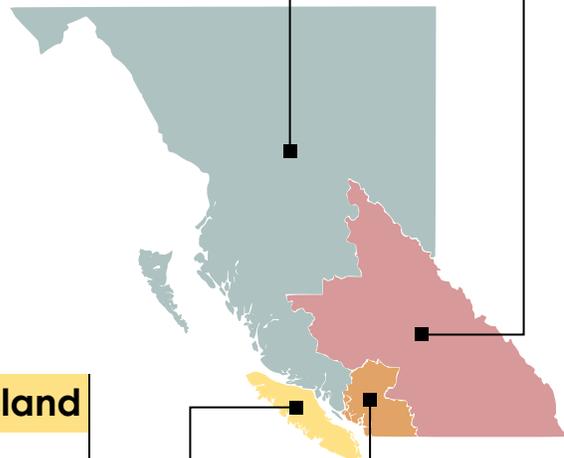
Appendix 4 - BC Milk Marketing Board

Sector Overview

Established Producers
 New Entrants
 Conventional Production
 Specialty Production

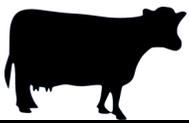
North	
Quota Producers:	
100%	2
Quota Holdings:	
100%	162
Production (kg):	59,428
100%	59,428
100%	59,428

Interior	
Quota Producers:	100
8%	8
92%	92
Quota Holdings:	14,201
3%	424
97%	13,777
Production (kg):	5,878,030
2%	103,941
98%	5,774,089
4%	245,805
96%	5,632,225
Processors:	15



Vancouver Island	
Quota Producers:	
100%	42
Quota Holdings:	
100%	6,461
Production (kg):	2,252,040
100%	2,252,040
100%	2,252,040
Processors:	8

Lower Mainland	
Quota Producers:	343
15%	52
85%	291
Quota Holdings:	69,772
5%	3,223
95%	66,549
Production (kg):	25,369,734
3%	849,815
97%	24,519,919
5%	1,262,871
95%	24,106,862
Processors:	28



Appendix 4 - BC Milk Marketing Board

Production & Statistics

These tables use Milk Board 2019 PARP report statistics from the beginning of the reporting period.

Producer Size

		# of Producers		Quota Held		Production (kg)	
Small	(<85 kg/day CDQ)	159	33%	8,492	9%	3,249,817	10%
Medium	(85.1 - 185 kg/day CDQ)	177	36%	23,074	25%	7,722,985	23%
Large	(>185 kg/day CDQ)	151	31%	59,030	65%	22,586,429	67%
Total		487		90,596		33,559,231	

Producer Type

		# of Producers		Quota Held		Production (kg)	
Established Producers		427	88%	86,949	96%	32,605,475	97%
New Entrants		60	12%	3,647	4%	953,756	3%
Total		487		90,596		33,559,231	

Region

		# of Producers		Quota Held		Production (kg)	
Lower Mainland		343	70%	69,772	77%	25,369,734	76%
Vancouver Island		42	9%	6,461	7%	2,252,040	7%
Interior		100	21%	14,201	16%	5,878,030	18%
North		2	0%	162	0%	59,428	0%
Total		487		90,596		33,559,232	

Production Type

		# of Producers		Quota Held		Production (kg)	
Conventional		453	93%	86,630	96%	32,050,554	96%
Specialty		22	5%	2,674	3%	1,015,468	3%
Lifestyle		3	1%	330	0%	157,912	0%
Specialty Lifestyle		9	2%	961	1%	335,296	1%
Total		487		90,595		33,559,230	

New Entrants to the Sector

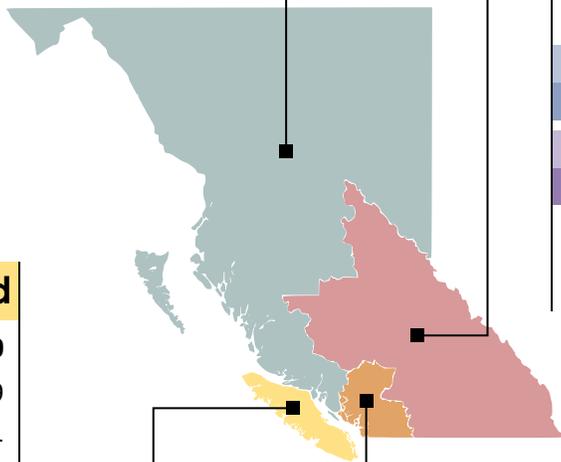
- 2 through the Graduated Entrant Program in the Lower Mainland
- 1 through farm purchase (Going Concern sale)



Appendix 5 - BC Turkey Marketing Board

2018 Sector Overview

Established Producers
 New Entrants
 Conventional Production
 Specialty Production



North	
Quota Producers:	
100%	4
Quota Holdings:	
100%	70,000
Production (kg):	
100%	59,920
100%	59,920
Processors	1

Interior	
Quota Producers:	6
50%	3
50%	3
Quota Holdings:	614,693
6%	35,000
94%	579,693
Production (kg):	487,408
2%	8,279
98%	479,129
93%	452,039
7%	35,369
Processors	4
Small Lot Producers:	11

Vancouver Island	
Quota Producers:	10
90%	9
10%	1
Quota Holdings:	825,020
20%	162,500
80%	662,520
Production (kg):	728,987
16%	118,082
84%	610,905
16%	118,082
84%	610,905
Processors	4
Small Lot Producers:	19

Lower Mainland	
Quota Producers:	47
9%	4
91%	43
Quota Holdings:	25,019,548
1%	143,000
99%	24,876,548
Production (kg):	22,772,720
1%	115,458
99%	22,657,262
5%	1,161,734
95%	21,610,986
Processors	5
Small Lot Producers:	4



Appendix 5 - BC Turkey Marketing Board

Production & Statistics

These tables use Turkey Board 2019 PARP report statistics. Turkey new entrant statistics includes producers entering the industry since 2006.

Producer Size

	# of Producers		Quota Held (85.6%)		Production (kg)	
Small (<100,000 kg)	27	15%	668,238	3%	541,475	2%
Medium (100,001 - 687,500 kg)	24	51%	10,275,359	39%	9,153,440	38%
Large (>687,501 kg)	16	34%	15,585,664	59%	14,354,120	60%
Total	67		26,529,261		24,049,035	

Producer Type

	# of Producers		Quota Held (100%)		Production (kg)	
Established Producers	47	70%	26,188,761	98%	23,747,296	99%
New Entrants	20	30%	410,500	2%	301,739	1%
Total	67		26,529,261		24,049,035	

Region

	# of Producers		Quota Held (100%)		Production (kg)	
Lower Mainland	47	70%	25,019,548	94%	22,772,720	95%
Vancouver Island	10	15%	825,020	3%	728,987	3%
Interior	6	9%	614,693	3%	487,408	2%
North	4	6%	70,000	0%	59,920	0%
Total	67		26,529,261		24,049,035	

Production Type

	# of Producers		Quota Held (100%)		Production (kg)	
Commercial	40	60%	24,380,409	92%	22,257,260	93%
Specialty	26	39%	2,127,790	8%	1,763,488	7%
Organic	1	1%	21,062	0%	28,287	0%
Total	67		26,529,261		24,049,035	

New Entrants to the Sector

- 3 new entrants were invited through the New Entrant Program

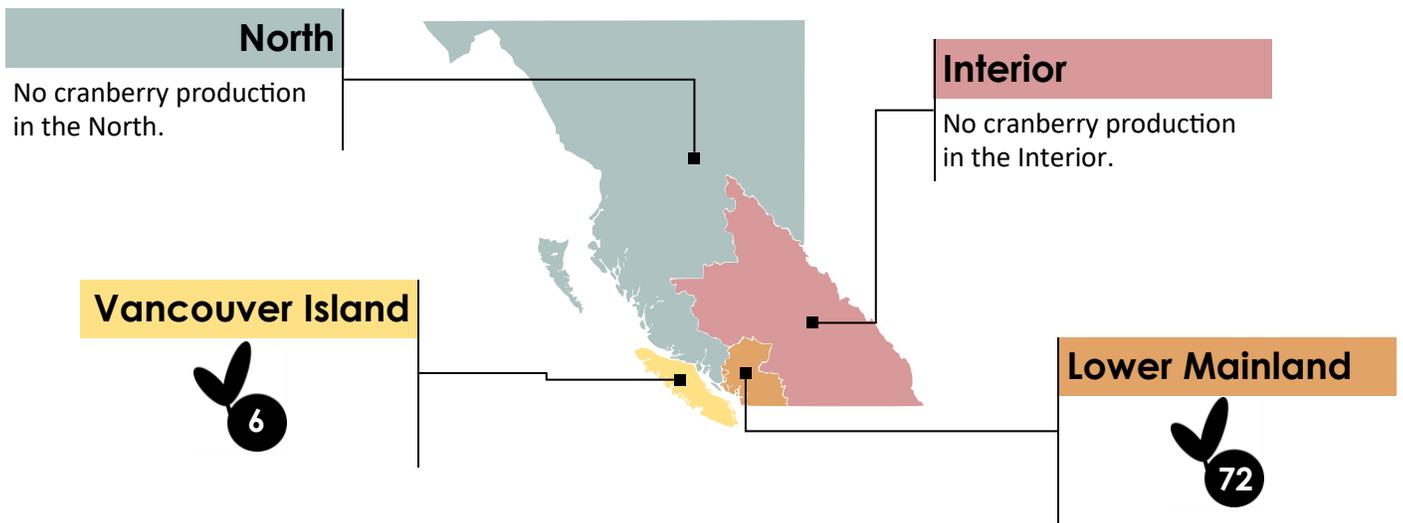


2018 Sector Overview

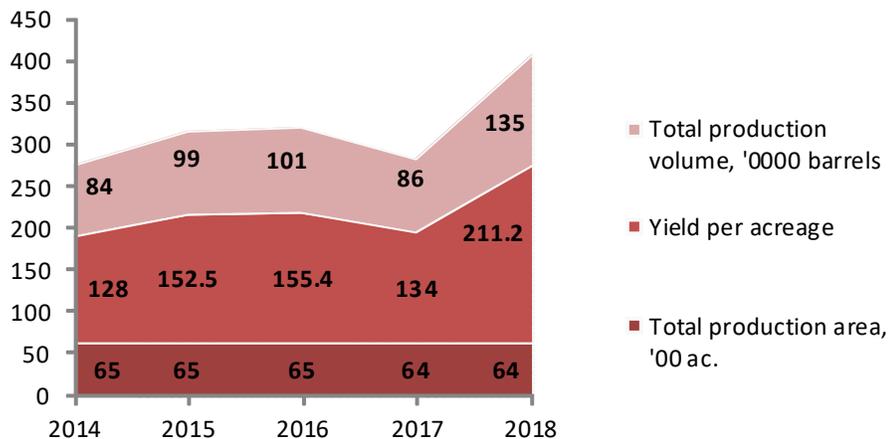
In B.C., cranberry production is regulated at the provincial level.

- Producers with two acres or more of production per year must be registered and licensed with the Cranberry Commission. Producers with less than two acres of production per year are not required to hold a licence.
- In 2018, registered B.C. cranberry growers planted 6,382 acres and produced 1.3 million barrels of cranberries.
- In 2018, B.C.'s licensed cranberry farm gate receipts were estimated at about \$40 million.
- B.C. is the 2nd largest cranberry producing province in Canada with 35% of the national share.

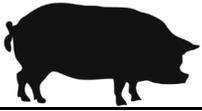
Licensed Cranberry producers in B.C., 2018



Aggregate cranberry production, yield, and planted area in B.C.



Stats as reported by the Cranberry Commission in the PARP report and in BCFIRB's Industry Snapshots.

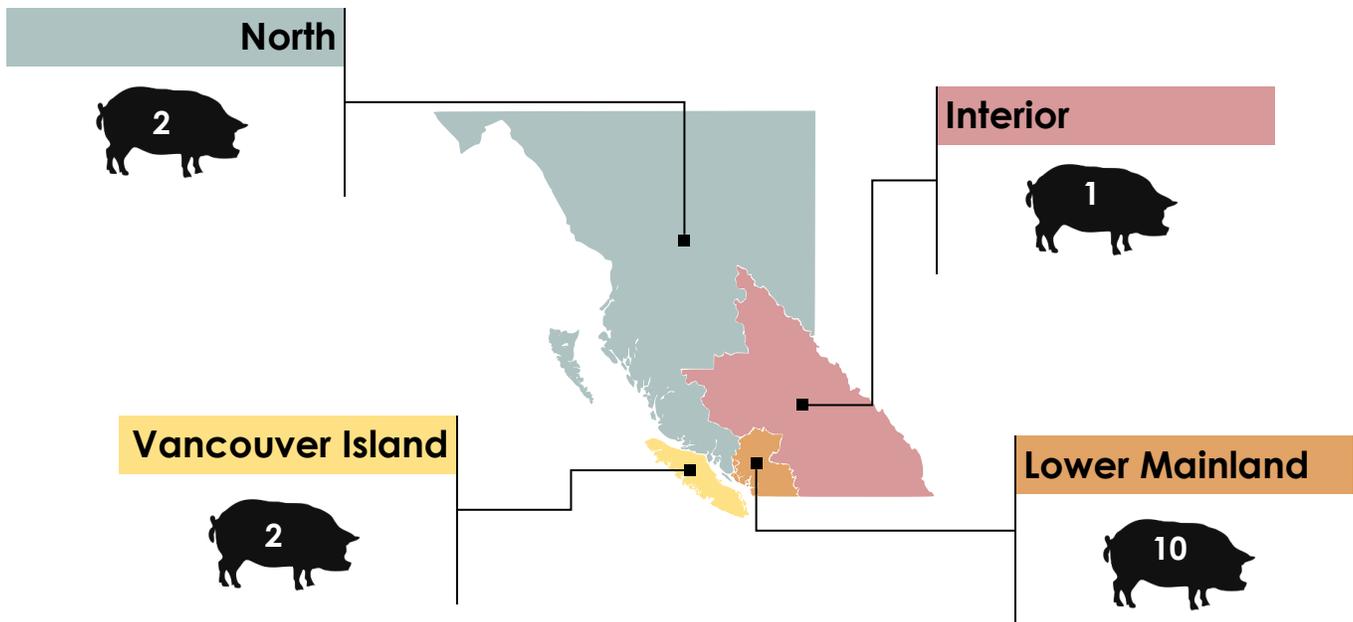


2018 Sector Overview

In B.C., hog production is regulated at the provincial level.

- Producers growing 300 or more commercial hogs per year must be registered and licensed with the Hog Commission. Producers that grow less than 300 hogs per year are not required to hold a licence.
- In 2018, there were about 1,000 total hog producers in B.C., of which 15 were licensed. Licensed producers raised an estimated 113,928 hogs in 2018. In 2017, licensed hog producers raised 141,000 hogs that accounted for an approximate 59% of the total provincial hog production.
- In 2017, farm cash receipts of licensed hog producers totalled \$32.4 million.
- In 2017, the B.C. hog industry produced around 5% of pork consumed in the province.
- B.C. ranks 6th among Canadian provinces with production equivalent to 1% of the national share.

Licensed hog producers in B.C., 2018



Hogs raised by licensed producers in B.C.



Stats as reported by the Hog Commission in the PARP report and in BCFIRB's Industry Snapshots.

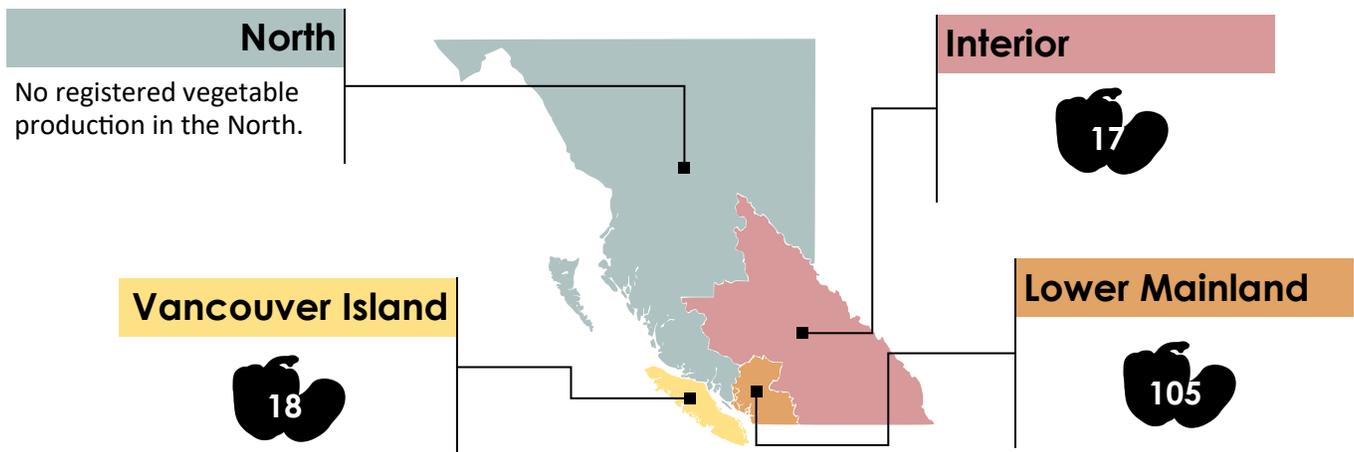


2018 Sector Overview

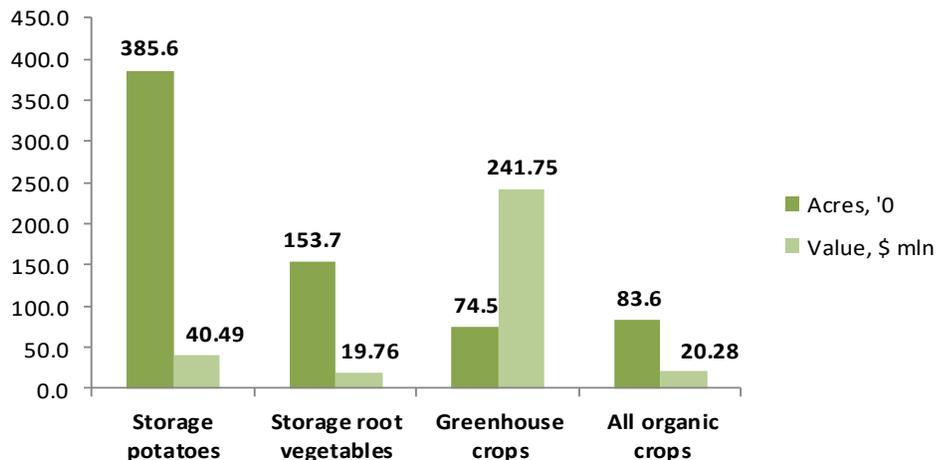
In B.C., vegetable production is regulated at the provincial level.

- Anyone operating a farm on which one tonne or more of a regulated vegetable has been produced over a year must be registered and licensed as a producer by the Vegetable Commission. This includes regulated vegetables that are certified as organic.
- In B.C., the regulated vegetables for fresh and processing use are: Greenhouse Crops: tomatoes, cucumbers, peppers, lettuce. Storage crops: beets (tops off), green and red cabbage, carrots (tops off), parsnips, potatoes, rutabagas, white turnips, yellow onions. Crops regulated for processing use only are: beans, broccoli, Brussels sprouts, cauliflower, corn, peas, strawberries.
- In 2018, there were 57 licenced greenhouse producers, 78 storage crop producers and 5 processing crop producers in B.C., whose total production of vegetable crops was estimated at \$322 million.
- B.C. is Canada's 2nd largest greenhouse producer of tomatoes, peppers and cucumbers.

Licensed vegetable producers in B.C., 2018



Regulated vegetable crops acreage and value in B.C., 2018



Stats as reported by the Vegetable Commission in the PARP report and in BCFIRB's Industry Snapshots.

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