PUBLIC ACCOUNTABILITY AND REPORTING PROJECT (PARP)

Summary Report

March 2021

For Reporting Period 2019

BC Farm Industry
Review Board

Contents

BC Farm Industry Review Board Introductory Comments

The BC Farm Industry Review Board (BCFIRB) is pleased to present the March 2021 Summary Report for its Public Accountability and Reporting Project (PARP). This is the second report in an annually published series based on individual reports submitted by B.C.'s eight agricultural commodity boards and commissions (the boards). We very much thank the boards for their contributions, particularly considering the many challenges they faced in 2020 as a result of the Covid-19 pandemic and its impact on their sectors.

The PARP's overall goal is to support and publicly demonstrate effective governance and leadership within the regulated agriculture sectors. Good governance and informed, strategic decision-making are, after all, essential elements required for the delivery of sound marketing policy outcomes that matter.

The PARP originated from BCFIRB's February 2018 Quota Assessment Tools Supervisory Review decision (Quota Review). BCFIRB has worked with the boards since 2018 to identify, refine and streamline sector performance targets and measures for governance practices and quota management and movement.

The PARP has a different focus from the information reported in existing board annual reports.

BCFIRB will continue to work with the boards to simplify the reporting process, ensure consistency of data collected and enhance the comparison of year-to year results. Together we've made good progress on Public Accountability and Reporting since 2018.

Performance targets vary between boards and change over time based on the needs and strategic direction of their sectors. All boards continued to demonstrate consistent use of good governance tools in 2019. From 2018 to 2019, there were minor increases in production volume for some sectors, with increases in specialty production. There was little change in regional distribution of production. Although the number of producers increased slightly in a few sectors, there was a minor decrease in the overall number of all licensed producers in all of the sectors combined. Within supply managed sectors, there was a small increase in large-sized producers, with small decreases in small and medium sized producers. Finally, there was an increase in the overall number of new producers.

Overall, BCFIRB continues to be satisfied with the results of PARP and is committed to continuous improvement.

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, chickens, eggs, milk (cow), and turkeys.

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 and coordinated by federal-provincial agreements. National agencies established by federal legislation set national production volumes and share production between the provinces based on agreements. Provincial commodity boards, established by provincial regulation, manage provincial production and set the price a producer receives for their product. The federal government controls import levels to manage the volume of broiler hatching eggs, chickens, eggs, milk and turkey products entering from other countries.

Other B.C. agriculture commodities are regulated provincially. Provincially regulated B.C. commodities include cranberries, hogs and vegetables. Unlike supply managed commodities, there are no federal import controls, and regulatory authorities are limited. Vegetable production and price are regulated in the province, while regulation of cranberries involves processing, storage and marketing controls. Hogs focuses on marketing and does not include production or pricing control authorities. All provinces in Canada have some form of provincially regulated agriculture production, although commodities and regulations vary widely.

B.C.'s Agricultural Commodity Boards and Commissions

B.C.'s commodity boards are first instance regulators and are granted significant legislative powers to manage their regulated commodities. The boards must be responsive to the needs of producers, processors, consumers and other participants in the agri-food industry. They include:

Supply Managed Sectors:

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

Regulated Non-Supply Managed Sectors:

- *BC Cranberry Marketing Commission*
- *BC Hog Marketing Commission*
- *B C Vegetable Marketing Commission*

Guide to the Reader

BCFIRB's Role

BCFIRB is an independent administrative tribunal, responsible under the *Natural Products Marketing (BC) Act* (NPMA) for the supervision of the boards. BCFIRB 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 first instance regulators and granted significant legislative powers to manage their regulated commodities.

Public Accountability and Reporting Project (PARP) Background

BCFIRB is mandated to provide oversight and policy direction to the boards to ensure sound, orderly marketing and to protect the public interest. To assist in meeting these responsibilities, BCFIRB initiated the PARP in March 2018. Boards have been asked to prepare public reports containing information for 2018 and 2019 cycles in three main areas:

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

For the 2019 board reporting cycle, BCFIRB developed, in consultation with the boards, a reporting guide and templates to streamline the reporting process and support the collection of consistent data across sectors. Changes to some of the data reporting requirements were made in 2020 based on BCFIRB and commodity board experience with the previous reporting cycle. As such, readers should exercise caution comparing data between 2018 and 2019.

Sector Summary

There is a new section in the March 2021 Summary Report which provides a summary overview of B.C.'s regulated agricultural sectors. Some preliminary observations about differences in the data and information between 2018 and 2019 are included in this section.

Sector Performance Targets

BCFIRB continues to believe that clear sector performance targets are essential to establishing and communicating the future direction and structure of B.C.'s regulated sectors as set by the boards. This section reports on current commodity board performance targets and status.

Governance

Good governance positions boards to deliver sound marketing policy outcomes in the public interest. This section reports on commodity board establishment and use of good governance tools and processes against specific measures.

Quota Management and Movement

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. Quota management and movement plays a key role in shaping the structure and function of the chicken, egg, hatching egg, milk and turkey sectors in B.C. This section provides an overview of quota holdings and production in B.C., by region and type of production. An overview of quota growth distribution and movement in 2019 is also provided.

Readers are encouraged to review the Appendices at the end of this report, as well as the individual commodity board reports on BCFIRB's Public Accountability and Reporting Project web page.

Sector Summary

This section contains an overview of B.C.'s supply managed and provincially regulated sectors in 2019. Key changes observed since 2018 are also highlighted.

Farm Cash Receipts – 2019

Total reported 2019 farm cash receipts for all regulated commodities in B.C. is an estimated $1.9 billion. Supply managed sectors contributed $1.5 billion, while provincially regulated sectors contributed over $400 million.

Definitions

Licenced Producer

Unless small lot producers are specified, producer should be taken to mean licenced producers or growers holding a licence to produce quota or a provincially regulated product.

New Producer

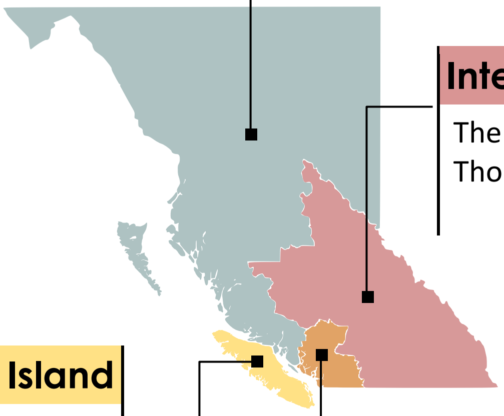
All producers who have been in the sector for up to 10 years plus a day.

> *Supply managed*: Anyone who has entered through a New Entrant Program.
>
> *Provincially regulated*: Anyone who has entered as a new licence holder.

B.C. Regions

North

The Coast north of the Sunshine Coast, Bulkley-Nechako, and the Peace



Interior

The Okanagan, the Kootenays, Thompson-Nicola, and the Cariboo

Vancouver Island

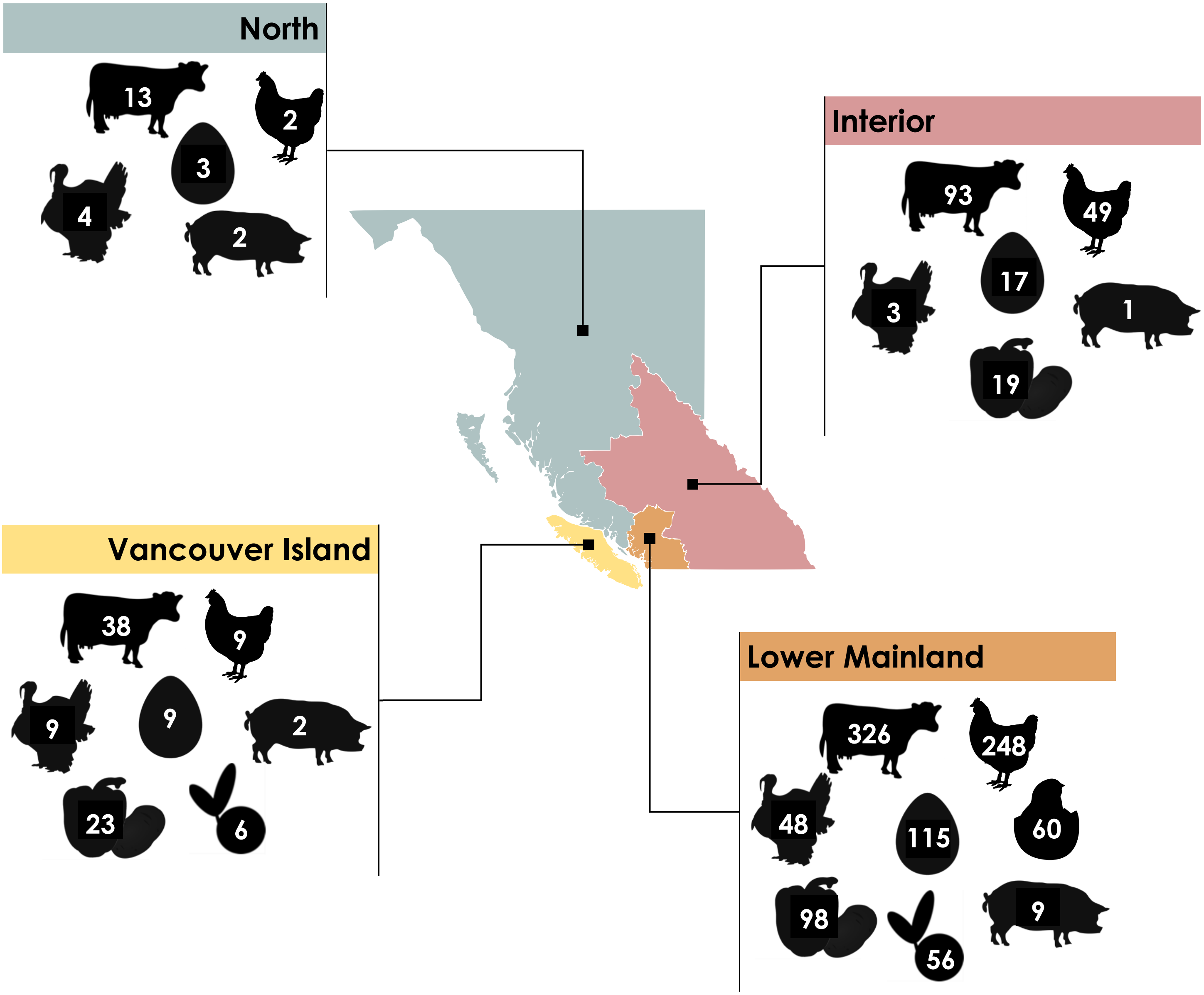
Vancouver Island and Gulf Islands

Lower Mainland

Greater Vancouver, the Fraser Valley, the Sunshine Coast, and Squamish-Lillooet

Sector Summary

Licenced Producers of all Regulated Commodities in B.C. - 2019



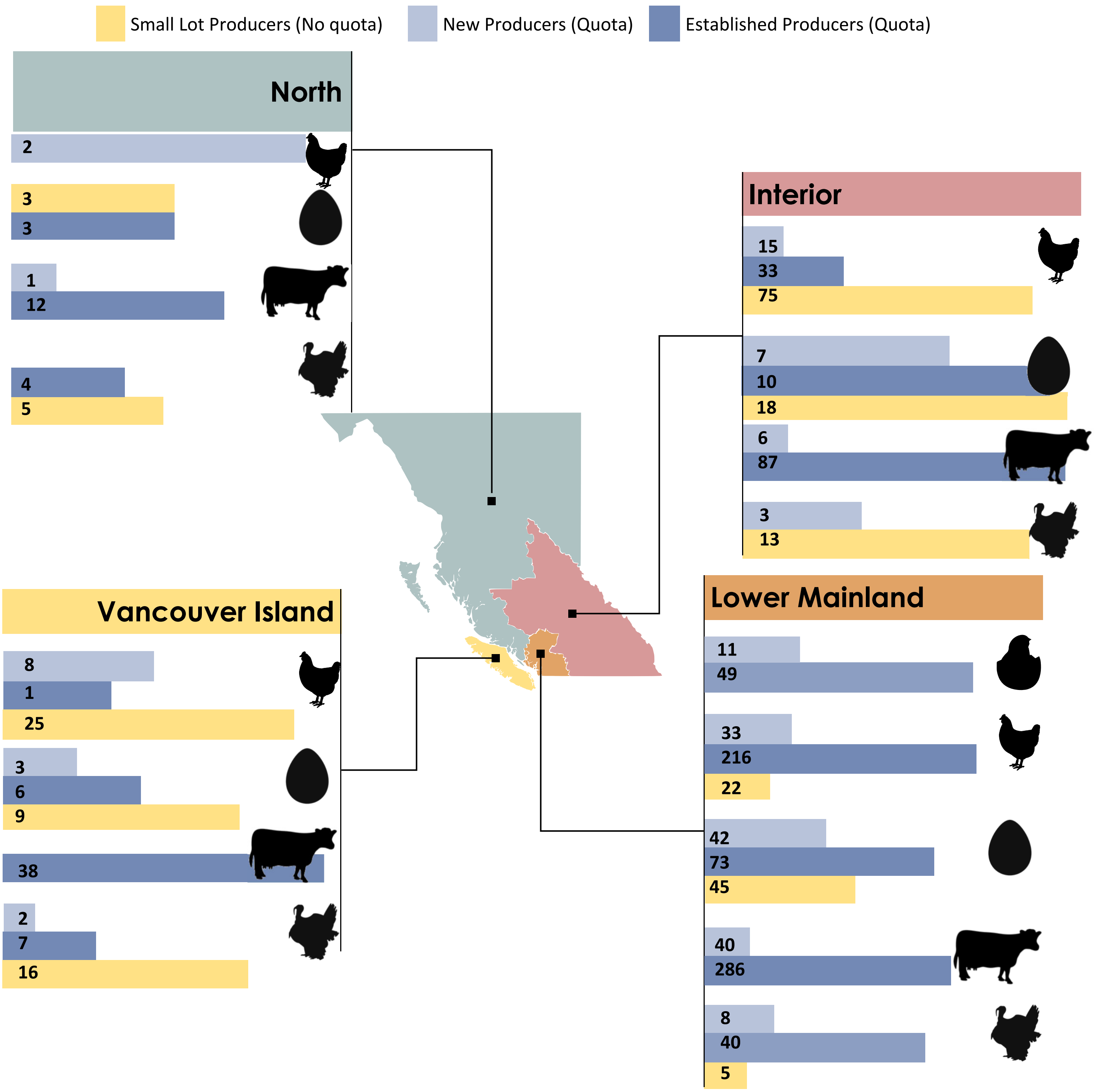
Total Licenced Producers of all Regulated Commodities

Milk	470
Chicken	308
Vegetables	140
Eggs	144
Cranberries	62
Turkey	64
Hatching Eggs	60
Hogs	14
Total Licenced Producers	**1,262**

Supply Managed Producers in B.C. - 2019

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

- ***New producers*** entered the industry within the last 10 years.
- ***Established producers*** have been in the industry for more than 10 years.
- ***Small lot producers*** are small scale farms operating under a commodity board permit.

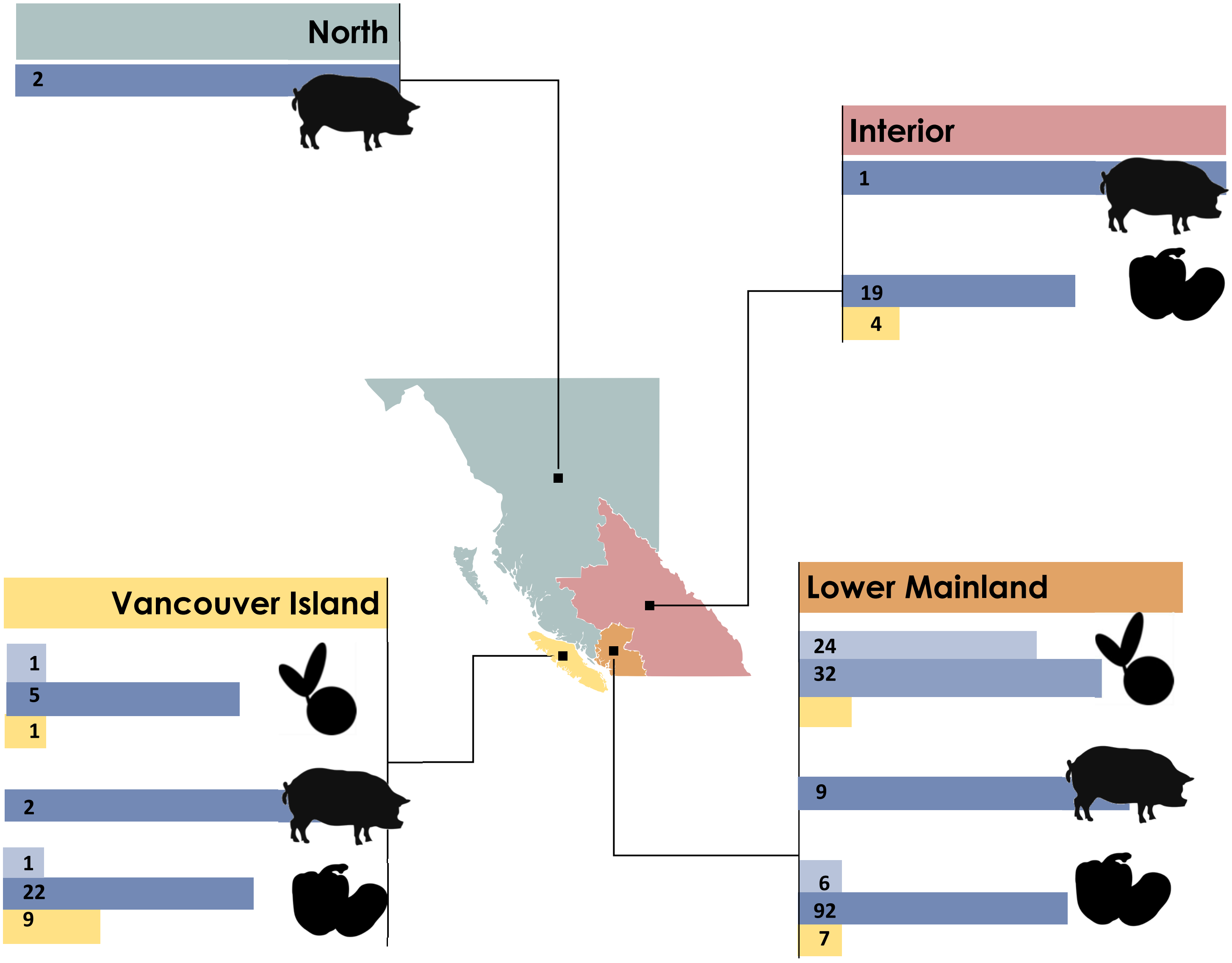


Provincially Regulated Producers by Type in B.C. - 2019

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

- ***New producers*** entered the industry within the last 10 years.
- ***Established producers*** have been in the industry for more than 10 years.
- ***Small lot producers*** are small scale farms operating under a commodity board permit.

🟨 Small Lot Producers ▨ New Producers 🟦 Established Producers



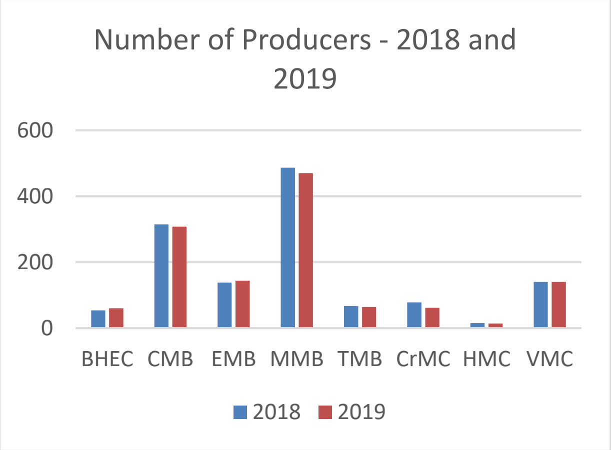
Observations – 2018 and 2019

From 2018 to 2019, there were minor increases in production volume for some sectors, with increases in specialty production. There was little change in regional distribution of production. Although the number of producers increased slightly in a few sectors, there was a minor decrease in the overall number of all licensed producers in all of the sectors combined. Within supply managed sectors, there was a small increase in large-sized producers, with small decreases in small and medium sized producers. Finally, there was an increase in the overall number of new producers.

Acronym key:
BHEC: Hatching Eggs
EMB: Eggs
MMB: Milk
CMB: Chicken
TMB: Turkey
CrMC: Cranberries
HMC: Hogs
VMC: Vegetables

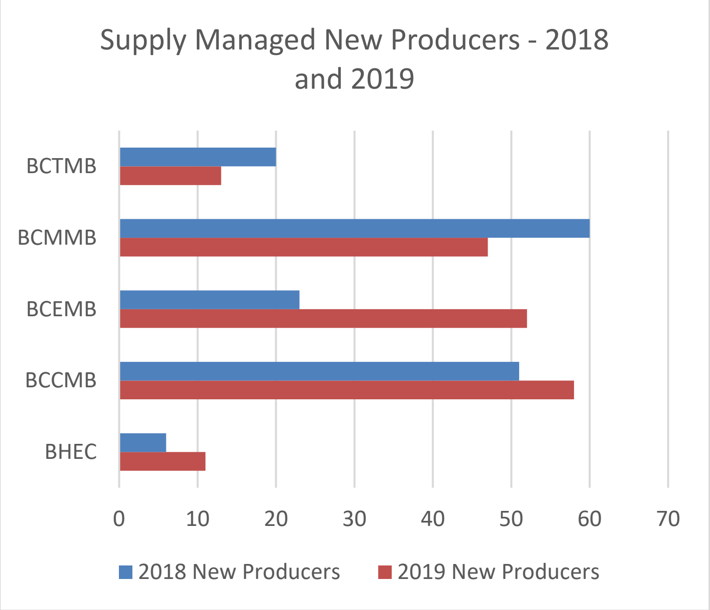
Number of Licensed Producers

Commodity boards reported a total of 1,262 licenced producers in 2019, down from 2.5% from 2018.

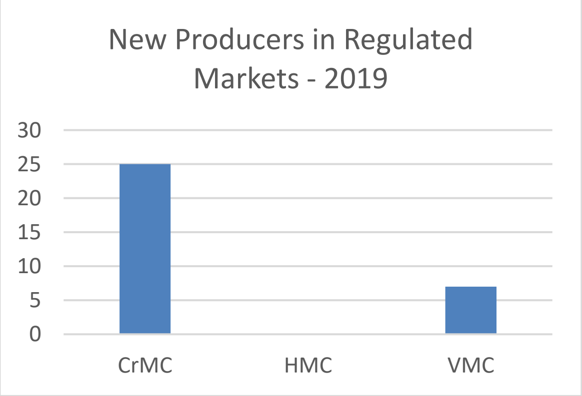


New Producers

There were a total of 181 new supply managed producers in 2019 (new within the past 10 years), 13% more than in 2018. More turkey and dairy new producers transitioned to established producers than entered between 2018 and 2019, resulting in a reported decrease in total new producers in those sectors.



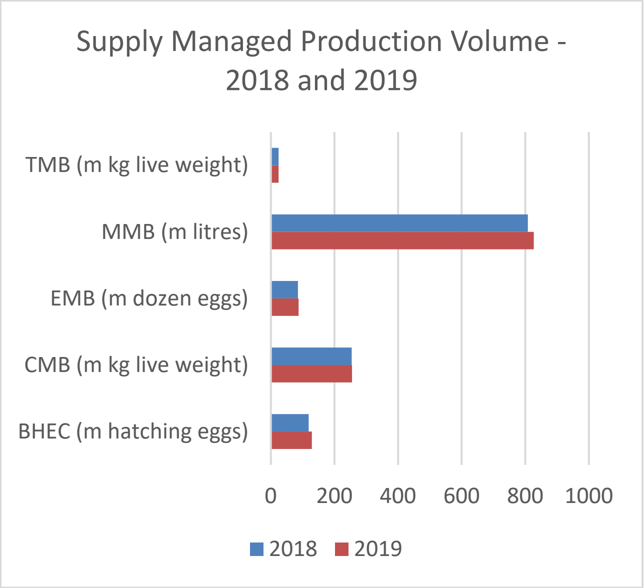
There were a total of 32 new producers (new within the past ten years) in the regulated marketing sectors (cranberries, hogs, and vegetables) in 2019.



Production Volume

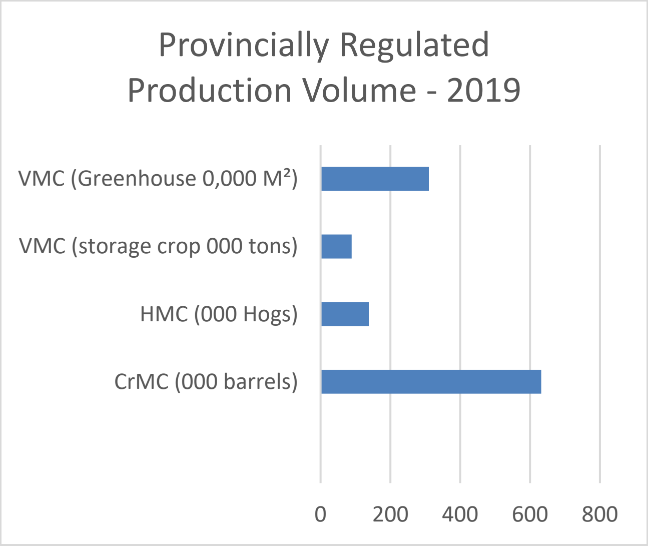
Hatching eggs, eggs and milk production increased over 2%, while chicken production increased by about 1%. There was little change in regional distribution of production.

Supply Managed Production Volume - 2018 and 2019



Cranberry production suffered a serious decline in 2019 due to weather and other external factors.

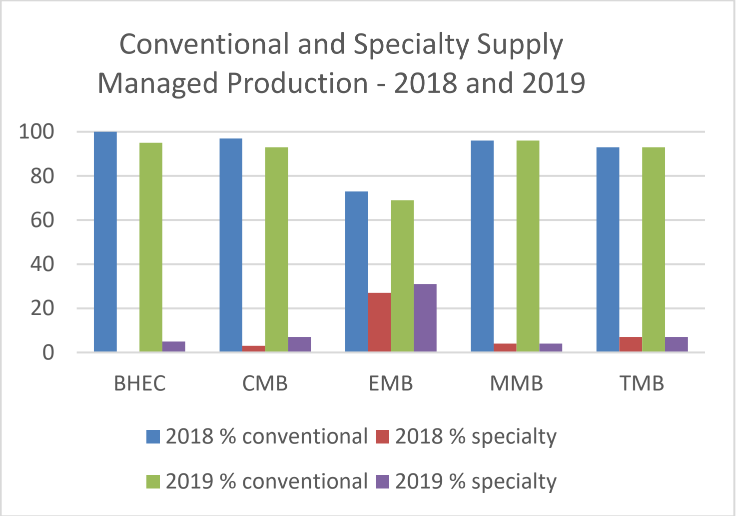
Provincially Regulated Production Volume - 2019



Production Type

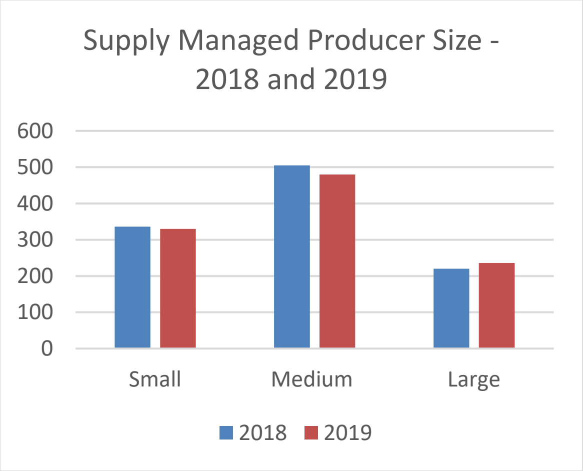
There were small increases in specialty production for all sectors. Specialty broiler hatching egg production was not reported in 2018.

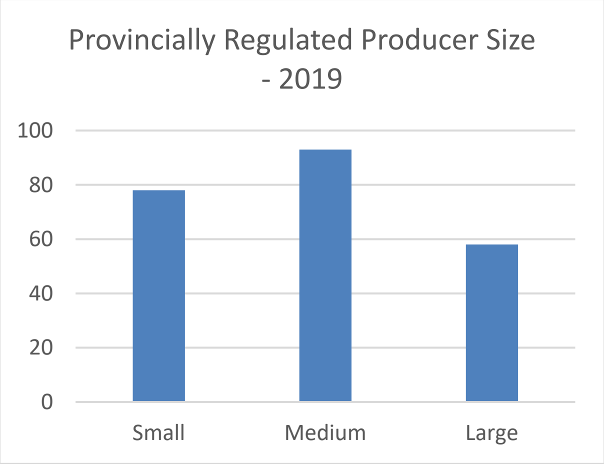
Conventional and Specialty Supply Managed Production - 2018 and 2019



Producer Size

There was a minor increase in large supply managed producers and a small decrease in small and medium sized producers. Producer size for each sector has been defined by each board and can be found in the Appendices.





Sector Performance Targets

As part of the PARP, BCFIRB asked the boards to set performance targets for the industry sectors they regulate. The targets were updated by each board for the 2019 reporting period and continue 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.

Boards revise and update their targets over time and as part of their regular strategic planning processes. As such, targets may change from year to year.

The following tables represent 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.

Supply Managed Sectors

B.C.'s supply management boards are granted a broad range of legislated powers to manage regulated agricultural commodities (i.e., broiler hatching eggs, chicken, eggs, cow's milk, and turkey). These powers allow the boards to promote, regulate and control the production, transportation, packing, storing and marketing of the regulated commodities.

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 BC Vegetable Marketing Commission, is granted the authority to also regulate production (i.e., how much volume is grown).

Because of their powers, the boards play a major role in shaping the sectors they regulate, as reflected in their sector performance targets described on the following pages.

Target status key:

●	Reported as in place
◖	Reported as in progress
○	Reported as to be started
N/R	Not reported

BC Broiler Hatching Egg Commission
(Hatching Egg Commission)

Build a joint Hatching Egg Commission-Chicken Board industry framework ◐

The Hatching Egg Commission and the Chicken Board will develop a framework (Summit Initiatives) for engagement on what the future of the B.C. chicken industry should look like. This will permit the Hatching Egg Commission and the Chicken Board to work together with supply chain towards a concise, united vision that acknowledges major projects such as pricing and linkage.

The Boards are looking towards co-tenancy through a new lease or building purchase as part of this strategy.

Pricing & cost of production (COP) review ◐

The Hatching Egg Commission is committed to the review of all pricing matters, such as the Linkage Agreement, hatching egg cost of production, hatchery margin, fowl and a Western Pricing Initiative with the three other western provinces.

Salmonella Enteritis (SE) mitigation ◐

Reducing the prevalence of SE in flocks is a public health matter. The Hatching Egg Commission is committed to working with the Canadian Hatching Egg Producers, in conjunction with stakeholders, on a surveillance program and investigate insurance options.

Quota management review - Quota Assessment Tools Supervisory Review (QATR) ○

The Hatching Egg Commission will review its quota policies with respect to the QATR issued by BCFIRB and determine if policies require change (e.g., 10/10/10, LIFO, New Producer Program, growth, and utilization of quota).

BC Chicken Marketing Board

(Chicken Board)

All B.C. chicken growers are required to be certified and retain annual certification in the CFC Animal Care (ACP) and On Farm Food Safety (OFFS) programs ●

Chicken Farmers of Canada requires all Canadian provinces to participate in the CFC Animal Care and On Farm Food Safety Programs. Through our Field Services Staff, the Chicken Board performs annual on farm audits on all registered B.C. chicken farms. The Chicken Board's target is 100% annual compliance by all growers.

All B.C. chicken growers are required to be certified in the BC Bio Security Program on an annual basis ●

The BC Bio Security Program is unique to the province of British Columbia and was developed in response to the 2004 Avian Influenza outbreak. Since 2007 this program has been mandatory for all registered B.C. chicken growers. The Chicken Board's target is 100% annual compliance by all growers.

100% utilization of B.C.'s share of the Chicken Farmers of Canada (CFC) allocation on a cycle by cycle and annualized basis ●

In order to ensure that the B.C. chicken value chain is able to take full advantage of the opportunity to produce its share of the annual market for Canadian chicken, the Chicken Board works to ensure that its regulations and policies enable B.C. chicken growers to produce 100% of their share of the national chicken allocation.

BC Egg Marketing Board
(Egg Board)

Enhance farm transparency ◖

Publish 100% of farmers' profiles on the Egg Board website by December 2021 (this will include on-farm program audits).

Launch BC Egg's customized animal welfare programs in 2020 (Barn Fitness Program, Specialty Audit).

Post audit requirements for all programs on the Egg Board website by December 2021.

Increase egg consumption ◖

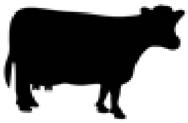
Increase per capita egg consumption to 300 by 2025. This target is in conjunction with Egg Farmers of Canada and will be completed through many tactics including:
- refresh the Egg Board online presence
- increase direct to consumer marketing
- increase education opportunities with teachers and students

Conduct regional outreach ◖

Convene at least four engagement events in the northern regions by the end of 2021 to ensure these regions are aware of the resources BC Egg can provide.

Optimize internal systems to better analyse hen housing and production data ◖

Have three updated computer programs prior to the end of 2020, update the producer portal by the end of 2021, providing producers with greater capacity to analyze their data.



BC Milk Marketing Board
(Milk Board)

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

A key strategy was to provide growth opportunities and assess the current Graduated Entry Program (GEP) to identify opportunities for improvement.

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

A key measure is to have clean and timely audit reports issued after the end of the fiscal year and no significant errors found or reported on in the findings report.

Evaluate a Renewal Policy to support new producers and/or capital investments 🟢

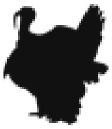
Develop and implement a succession policy for non-exempt persons to join the farm.

Communicate and promote new processor opportunities and available programs to industry 🟢

Upload a reference document for available innovation programs to the Milk Board website.

New IT systems for improved efficiency and risk management 🟢

Implementation of the Milk Management System (MMS) to ensure business continuity and improved service to the industry. The MMS system replaces the Milk Board's legacy business software used to manage quota, milk production & distribution, as well as billing and producer payment calculations.



BC Turkey Marketing Board
(Turkey Board)

Maintain responsible commercial pricing ◖

Prior to 2020, grower margins were lower than average. This was mainly due to decreasing feed prices in Eastern Canada and stable to climbing feed prices in the West. Since COVID-19, the Turkey Board has elected to keep the price differential between Ontario and B.C. consistent in order to provide support to the B.C. processing sector. As a result, grower returns are the lowest in over two decades. The Turkey Board continues to monitor the situation and is working with stakeholders. Indications are that storage stocks are decreasing, and demand has stabilized.

Effectively administer regulations ◖

The Turkey Board continues to respond to market situations and directions from BCFIRB. In 2019, the Turkey Board commissioned a Self Marketer's Need Assessment Report. Unfortunately, before the consultation process on the report was finalized, a third appeal involving this sector was initiated. In order to follow SAFETI[1] protocols, the Turkey Board has delayed any major policy decisions until the release of the latest appeal decision.

Maintain effective relationships with stakeholders ◖

The Turkey Board has been working with Turkey Farmers of Canada (TFC) and TFC stakeholders in the development of a New National Allocation Policy. In 2020, the current policy was not adhered to and the allocation was instead achieved by an ad-hoc formula. The Turkey Board is pleased with the outcome but would like to see a new policy in place sometime in the 2021/2022 quota year.

Optimize operational efficiency and effective decision making ●

On-Farm Programs, Auditing as well as Office "standard operating procedures" were developed or updated in 2020.

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[1] Strategic Accountable Fair Effective Transparent Inclusive

BC Cranberry Marketing Commission

(Cranberry Commission)

B.C. aggregate production increases year over year ◖

Cranberry production is highly variable due to weather events in B.C.; however progressive growers are adopting new varieties and implementing management practices to achieve the best production they can in a given year. 2018 was an exceptionally good year.

Yield per acre over number of planted acres ◖

Perhaps more important than overall barrels produced is an increase in yield. 2018 had a yield of 211 barrels per planted acre. As noted above, 2019 was a very difficult year for growers.

Number of education sessions (and number of attendees) 🟢

As growers learn more about beneficial production practices, they can produce a higher quantity and/or quality of berries, receiving higher incentives.

Number of industry research projects coordinated in part with the BCCMC 🟢

The Cranberry Commission's Research Committee determines research priorities, issues a request for proposals, and adjudicates research projects annually.

Confirmation all registered growers adhere to a pest management program 🟢

All registered growers must comply with Canadian Pesticide regulations. Growers submit their records to agencies if delivering to an agency, grower vendors submit their records for self-marketed berries directly to the commission. The agency confirms adherence for their growers.

BC Hog Marketing Commission
(Hog Commission)

Education ●

Due the small size of the B.C. pork sector, BC Pork decided to set aside funds to encourage producers to attend pork conferences in North America rather than holding a pork conference for B.C. producers. The BC Pork Manager sent information to producers on the Alberta, Ontario, Manitoba, and Saskatchewan pork conferences. The 2019 target was for chairs, directors, and member producers to attend eight education sessions. Education sessions included the seminars organized by the Centre for Organization Governance in Agriculture (COGA).

Canadian Quality Assurance (CQA) / Canadian Pork Excellence (CPE) Validation ◖

The Hog Commission's target is to transition from CQA to CPE and ensure 100% validation of producers. Their 2019 target was to be 100% compliant for two years CQA validations and 20% of producers validated under CPE.

BC Vegetable Marketing Commission
(Vegetable Commission)

Complete a strategic plan and performance targets for the next three years ◖

Develop a collective understanding of the internal and external environment in which the Vegetable Commission is operating. Build consensus on strategic direction and renew the Vegetable Commission's strategic framework. Identify key priorities and action steps. Provide a high-level strategic plan.

Restructure the Vegetable Commission to add independent commissioners ◖

Amend the vegetable marketing scheme to allow for the appointment of non-producer representatives to the board. Restructure the Vegetable Commission to enhance diversity of expertise and experience and the ability to maintain quorum when members are required to recuse themselves due to an actual or perceived conflict of interest.

Establish a governance operating model for agencies ◖

The Vegetable Commission sub-delegates marketing authority to licensed agencies whose regulatory role is to market regulated product on behalf of registered producers. The governance operating model provides for a clear understanding of 1) the Vegetable Commission's oversight, 2) expectations on operating processes, business structure, management systems, 3) culture, and 4) reporting requirements of agencies.

Add clarity to the rules in the General Order that address access to the market by storage crop agencies ◖

Delivery allocation manages the flow of Storage Crop product to the market. Designated Agencies are responsible for managing delivery allocation of each of their producers. Growth ambitions of any particular agency must take into account the collective view of market growth and expansion opportunities. No agency is permitted to ship in excess of the aggregate delivery allocation held by its producers unless authorized by the Vegetable Commission.

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.

All boards reported that they are following regulatory requirements, using sound decision-making practices, and are using, or are in the process of adopting, good governance tools. Boards regularly seek feedback from their stakeholders to address sound marketing policy and public interest questions and all boards demonstrate the use of SAFETI principles[1] in decision-making.

BCFIRB made some minor updates to its governance measures and template for this reporting cycle to better reflect the full scope of board governance activities. This report reflects these changes in the measures and Target Status Key.

Target status key:

🟢	Reported as in place
🔵	Reported as in place and under review
◖	Reported as in progress
○	Reported as to be started
N/R	Not reported

The following tables summarizes 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.

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[1] Strategic Accountable Fair Effective Transparent Inclusive.

TABLE 1 General Governance Tools and Related Regulatory Requirements

Summary of Measure	Commodity Board Reported Status							
	Broiler Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Strategic Plan	🔵	🟢	🟢	🟢	🔵	🟢	🔵	🔵
Annual Report	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Annual General meeting	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Copies of all minutes, orders, reports, rules and regulations sent to BCFIRB	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Consolidated Orders up to date & published	🟢	🟢	🔵	🟢	🟢	🟢	🟢	🟢
BCFIRB approved election rules	🟢	🔵	🟢	🟢	🟢	🟢	🟢	🟢
Current member job descriptions	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Member orientation	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Member training	🟢	🟢	🟢	🟢	🟢	🟢	🟢	◖
Staff orientation and training plans	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Member and staff succession plan as applicable	🟢	🟢	🟢	🟢	◖	🟢	◖	○
Member performance evaluations	🟢	🟢	🟢	🟢	◖	🟢	🟢	○
Staff performance evaluations	🟢	🟢	🟢	🟢	○	🟢	🟢	◖
Member code of conduct signed	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Member conflict of interest signed and updated annually	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Governance and operational policies and controls are up to date and public	🔵	🟢	🟢	🟢	🟢	🟢	🟢	🟢

TABLE 2 Financial Accountability and Related Regulatory Requirements

Summary of Measure	Commodity Board Reported Status							
	Broiler Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Auditor appointed in accord with Scheme requirements	●	●	●	●	●	●	●	●
Audited financial statements	●	●	●	●	●	●	●	●
Financial statements presented in annual report and at annual general meeting	●	●	●	●	●	●	●	●
Up to date member remuneration and expense policy	●	●	●	●	●	●	●	●
Accounting practices are in accord with legislation and published standards	●	●	●	●	●	●	●	●
Internal financial controls are in place, and reviewed by auditors	●	●	●	●	●	●	●	●
Senior staff engaged with budget development & approval	●	●	●	●	●	●	●	●
Levy collection and expenditures are in accord with the NPMA and Scheme.	●	●	●	●	●	●	●	●
Financial accountability processes and policies in place with producer associations and other organizations that receive funding from boards to carry out delegated responsibilities under the NPMA.	●	●	●	●	●	●	●	●

TABLE 3 Communication and Consultation

Summary of Measure	Commodity Board Reported Status							
	Broiler Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Active industry communication plan or strategy	●	●	●	●	●	●	●	◖
Crisis management communication plan or strategy	●	●	●	●	◖	●	●	◖
Meaningful consultation with stakeholders to address sound marketing policy and public interest questions	●	●	●	●	●	●	●	●
Stakeholder feed back actioned where appropriate	●	●	●	●	●	●	●	●
Avenue for regular stakeholder feedback	●	●	●	●	●	●	●	◖

TABLE 4 Decision Making

Summary of Measure	Commodity Board Reported Status							
	Broiler Hatching Egg Commission	Chicken Board	Cranberry Commission	Egg Board	Hog Commission	Milk Board	Turkey Board	Vegetable Commission
Quorum confirmed prior to decision making	●	●	●	●	●	●	●	●
Conflict of interest disclosure and recusals recorded	●	●	●	●	●	●	●	●
Processes are fair, inclusive, transparent, effective, and strategic based on the matter to be decided.	●	●	●	●	●	●	●	●
Full rationale published for major decisions (e.g., including demonstrated application of consultation, market, and other necessary information to reach sound marketing policy outcomes; demonstrated use of SAFETI in process & outcome)	●	●	●	●	●	●	●	●
Prompt timing, delivery, and publishing of decisions	●	●	●	●	●	●	●	◖

Quota Management and Movement

In consultation with the five supply-managed boards, 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 is important to informing strategic decision-making and policy development by the boards, BCFIRB, government and industry, in the interests of agriculture and the public.

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, eggs, cow's milk, turkey). Provincial regulations also create and provide the powers to the B.C. boards to regulate these sectors.

Quota holdings determine how much a producer may, and is required to, produce 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[2], small lot permit programs and personal consumption exemptions.

Setting and managing national and provincial production volumes

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

For all supply managed 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.

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[2] Successful program applicants receive quota at no cost from the commodity board.

B.C. Quota Facts

- Quota is a licence to produce a supply managed commodity,
- Quota is established by legislation and regulations.
- 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 famers' 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.

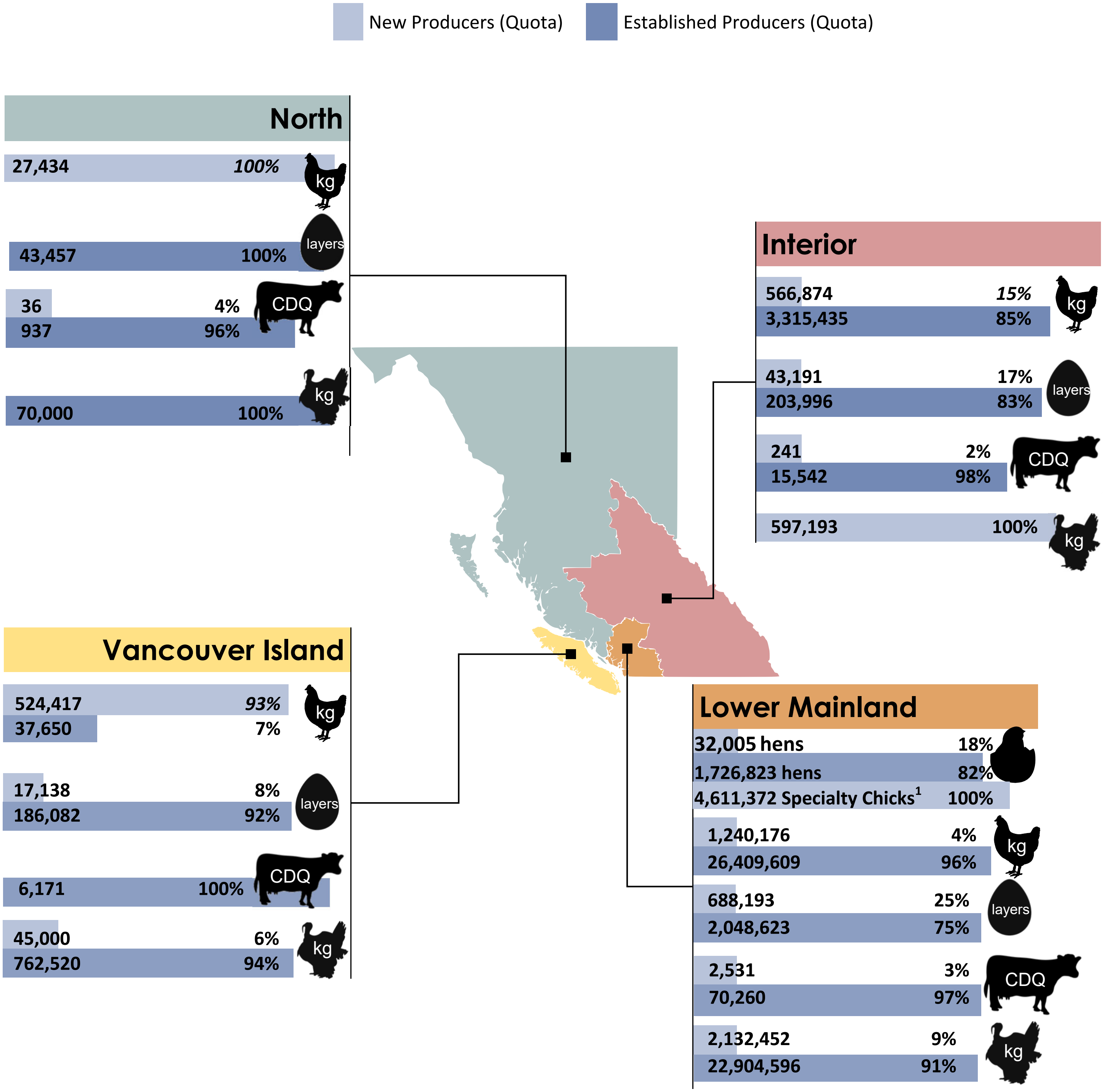
Quota Unit and Production Key

Commodity	Quota Unit	Production reported in:
Broiler Hatching Eggs	1 breeding hen placed / 2 years	Number of hatching eggs
	1 Specialty chick placed / year	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)	Litres
Turkey	1 kg live weight / 1 year	Kg live weight

Quota Holdings in B.C. - 2019

Each chart represents the proportion and volume of quota holdings by the type of producer (established or new entrant), commodity and region.

- ***New producers*** entered the industry in the last 10 years.
- ***Established producers*** have been in the industry for more than 10 years.



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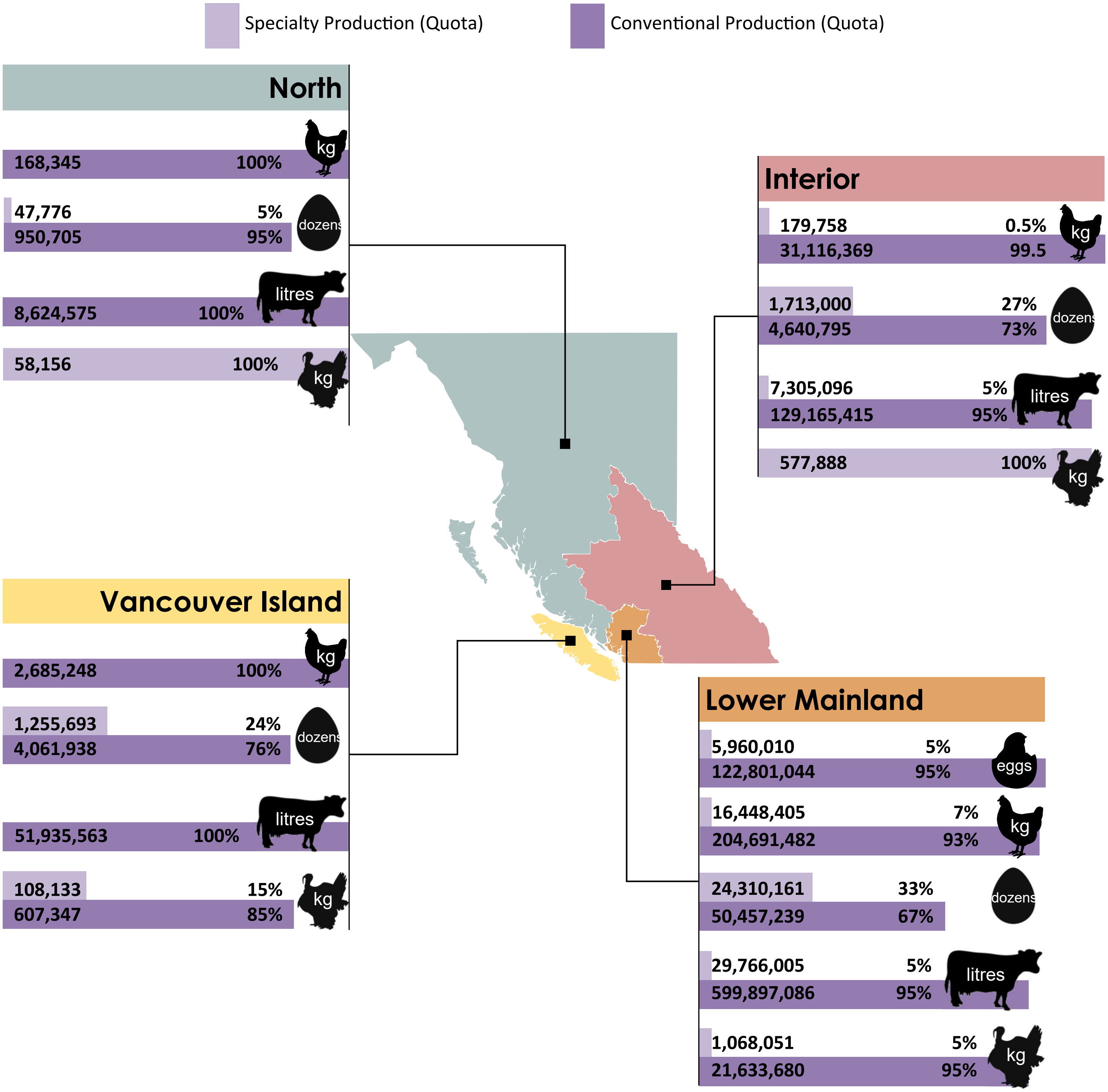
[1] Reflects new quota issued, not new producers.

Quota Production by Type in B.C. - 2019

Each chart represents the proportion and volume of conventional and specialty production quota held by producers, 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.



Growth Quota Distribution in B.C. - 2019

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

The Egg and Milk 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

		Established		New Producer		Total	
		Producers	**Quota**	**Producers**	**Quota**	**Producers**	**Quota**
By Producer Size	**Small**	5	1,491	30	8,755	35	10,246
	Medium	57	60,408	15	10,295	72	70,703
	Large	28	70,761	8	21,707	36	92,468
	Total	**90**	**132,660**	**53**	**40,757**	**143**	**173,417**
By Region	**Lower Mainland**	75	110,761	42	37,053	117	147,814
	Vancouver Island	6	9,812	2	794	8	10,606
	Interior	6	9,540	9	2,910	15	12,450
	North	3	2,547	0	0	3	2,547
	Total	**90**	**132,660**	**53**	**40,757**	**143**	**173,417**
By Type	**Conventional**	45	70,764	5	13,929	50	84,693
	Enriched	1	2,535	2	2,216	3	4,751
	Free Run	5	4,026	10	4,006	15	8,032
	Free Range	7	6,265	10	4,843	17	11,108
	Organic	10	5,725	17	6,798	27	12,523
	Mixed Quota	22	43,345	9	8,965	31	52,310
	Total	**90**	**132,660**	**53**	**40,757**	**143**	**173,417**

BC Milk Marketing Board

		Established		New Producer		Total	
		Producers	**Quota**	**Producers**	**Quota**	**Producers**	**Quota**
By Producer Size	**Small**	101	350	38	91	139	441
	Medium	140	1,018	5	40	145	1,058
	Large	155	3,672	2	22	157	3,694
	Total	**396**	**5,040**	**45**	**152**	**441**	**5,193**
By Region	**Lower Mainland**	272	3,862	38	139	310	4,001
	Vancouver Island	33	312	0	0	33	312
	Interior	81	829	6	11	87	840
	North	10	38	1	2	11	40
	Total	**396**	**5,040**	**45**	**152**	**441**	**5,193**
By Type	**Conventional**	368	4,810	41	142	409	4,952
	Specialty	17	148	3	8	20	156
	Lifestyle	3	26	-	-	3	26
	Specialty Lifestyle	8	56	1	2	9	59
	Total	**396**	**5,040**	**45**	**152**	**441**	**5,193**

Growth Quota Distribution in B.C. - 2019 cont'd

The Broiler Hatching Egg, Chicken, 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

- Hatching egg producers produced 103% of their mainstream quota and 98.4% of their specialty quota.
- BCBHEC did not report issuing any growth quota for the period.

BC Chicken Marketing Board

- Chicken growers produced 118% of their quota.

		Established		New Producer		Total	
		Producers	Quota	Producers	Quota	Producers	Quota
By Producer Size	**Small**	0	0	34	125,777	34	125,777
	Medium	0	0	2	32,282	2	32,282
	Large	0	0	0	0	0	0
	Total	**0**	**0**	**36**	**158,059**	**36**	**158,059**
By Region	**Lower Mainland**	0	0	36	158,059	36	158,059
	Vancouver Island	0	0	0	0	0	0
	Interior	0	0	0	0	0	0
	North	0	0	0	0	0	0
	Total	**0**	**0**	**36**	**158,059**	**36**	**158,059**

- All growth quota issued was in specialty production.

BC Turkey Marketing Board

- Turkey producers produced 86% of their quota.
- No growth quota is scheduled to be issued at this time.

Quota Movement in B.C. - 2019

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

# of all transfers: 7
Assessed: 6
Exempt: 1

Total volume of transfers: 549,968 hens & chicks
Exempt from assessment: 517,229 chicks
Subject to assessment: 32,739 hens
Total assessment collected: 1,637 hens

Total Transfers include 32,739 Mainstream Breeder Hens and 517,229 Specialty Chicks

Volume of Quota Transfer by Size and Producer Type

	Small	Medium	Large	TOTAL	Established	New Producer	TOTAL
Transfer From	20,439 Hens	12,300 Hens	0	**32,739 Hens**	32,739 Hens	0 Hens	**32,739 Hens**
	0 Chicks	517,229 Chicks	0	**517,229 Chicks**	0 Chicks	517,229 Chicks	**517,229**
Transfer To	32,739 Hens	0 Hens	0	**32,739 Hens**	5,000 Hens	27,739 Hens	**32,739 Hens**
	517,229 Chicks	0 Chicks	0	**517 229 Chicks**	0 Chicks	517,229 Chicks	**517,229**

- All transfers occurred in the Lower Mainland.

BC Chicken Marketing Board

# of all transfers: 75
Assessed: 2
Exempt: 73

Total volume of transfers: 2,897,834 kg live weight
Exempt from assessment: 2,867,276 kg live weight
Subject to assessment: 30,558 kg live weight
Total assessment collected: 8,148 kg live weight

- Chicken Board policies restrict the transfer of quota out of the Interior and off Vancouver Island

Volume of Quota Transfer by Size and Producer Type

	Small	Medium	Large	TOTAL	Established	New Producer	TOTAL
Transfer From	305,145	1,919,986	672,703	**2,897,834**	2,717,491	180,343	**2,897,834**
Transfer To	257,879	1,606,495	1,033,460	**2,897,834**	2,468,066	429,768	**2,897,834**

Quota Movement in B.C. - 2019 (cont'd)

BC Egg Marketing Board

# of all transfers: 5
Assessed: 1
Exempt: 4

Total volume of transfers: 35,410 Layer Hens
Exempt from assessment: 34,228 Layer Hens
Subject to assessment: 1,182 Layer Hens
Total assessment collected: 1,182 Layer hens

Volume of Quota Transfer by Size and Producer Type

	Small	Medium	Large	TOTAL	Established	New Producer	TOTAL
Transfer From	0	34,228	1,182	**35,410**	27,510	7,900	**35,410**
Transfer To	400	7,500	26,328	**34,228**	0	34,228	**34,228**

BC Milk Marketing Board

# of all transfers: 449
Assessed: 409
Exempt: 40

Total volume of transfers: 4,528 CDQ
Exempt from assessment: 2,643 CDQ
Subject to assessment: 1,885 CDQ
Total assessment collected: 0 CDQ

Volume of Quota Transfer by Size and Producer Type

	Small	Medium	Large	TOTAL[1]	Established	New Producer	TOTAL
Transfer From	686	1,295	663	**2,643**	4,286	242	**4,528**
Transfer To	804	1,134	705	**2,643**	4,193	335	**4,528**

[1] Excludes "On Exchange" transfers by size, data not reported.

BC Turkey Marketing Board

# of all transfers: 9
Assessed: 0
Exempt: 9

Total volume of transfers: 3,262,731 Kilograms Live Weight
Exempt from assessment: 3,262,731 Kilograms Live Weight
Subject to assessment: 0 Kilograms Live Weight
Total assessment collected: 0 Kilograms Live Weight

Volume of Quota Transfer by Size and Producer Type

	Small	Medium	Large	TOTAL	Established	New Producer	TOTAL
Transfer From	56,062	1,188,904	2,017,765	**3,262,731**	2,507,345	755,386	**3,262,731**
Transfer To	38,562	1,206,404	2,017,765	**3,262,731**	929,955	2,332,776	**3,262,731**

Conclusion

BCFIRB acknowledges and thanks the commodity boards for the significant work put in to assembling and publishing their PARP reports, particularly with the many challenges resulting from the COVID-19 pandemic in 2020. BCFIRB encourages the reader to explore the individual board reports for a fuller picture of B.C.'s regulated marketing sectors.

BCFIRB heard from the boards that the new reporting templates made reporting more efficient in 2020. In the long-term, the templates will support consistent measure and data collection.

Board performance targets evolve over time based on changing contexts and markets. BCFIRB continues to expect boards to take a short, medium and long-term strategic outlook to guide sector regulation.

From 2018 to 2019, there were minor increases in production volume for some sectors, with increases in specialty production. There was little change in regional distribution of production. Although the number of producers increased slightly in a few sectors, there was a minor decrease in the overall number of all licensed producers in all of the sectors combined. Within the supply managed sectors, there was a small increase in large-sized producers, with small decreases in small and medium sized producers. Finally, there was an increase in the overall number of new producers.

Over the last decade BCFIRB and the boards worked together to improve governance capacity. This year's report demonstrates boards have the majority of key governance tools and processes in place or in progress.

For example, boards report consultation with stakeholders, financial accountability measures and use of the SAFETI principles in decision-making.

Quota management and movement shapes the structure of B.C.'s supply managed sectors. Over time, regular and consistent reporting on quota (e.g., volume, region, production type, new entrants) will allow boards and BCFIRB to assess how the sectors are evolving against policy objectives such as regional diversification and meeting market demands.

In closing, BCFIRB understands that 2021 will continue to hold challenges for the boards and the agricultural sectors that they regulate. BCFIRB again thanks the boards for their ongoing dedication and efforts, and wishes everyone well in 2021.

References

BC Hatching Egg Commission. (2020). Public Accountability and Reporting Project. (to be linked to report on BCFIRB website)

BC Chicken Marketing Board. (2020). Public Accountability and Reporting Project. (to be linked to report on BCFIRB website)

BC Cranberry Marketing Commission. (2020). Public Accountability and Reporting (PARP) Project. (to be linked to report on BCFIRB website)

BC Hog Marketing Commission. (2020). Public Accountability and Reporting Project. (to be linked to report on BCFIRB website)

BC Milk Marketing Board. (2020). Public Accountability and Reporting Project. (to be linked to report on BCFIRB website)

BC Turkey Marketing Board. (2020). Public Accountability and Reporting Project. (to be linked to report on BCFIRB website)

BC Vegetable Marketing Commission. (2020). Public Accountability and Reporting Project *(PARP)* Project. (to be linked to report on BCFIRB website)

PARP
Appendices

Contents

Appendix 1 - BC Broiler Hatching Egg Commission

2019 Sector Overview

🟦 Established Producers 🟦 New Producers 🟪 Conventional Production 🟪 Specialty Production

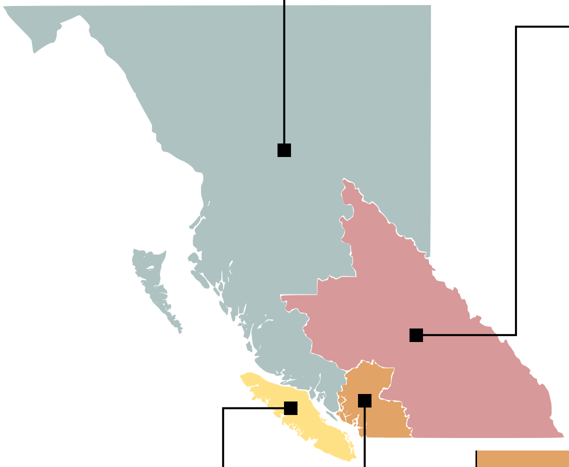
North

No hatching egg producers.

Interior

No hatching egg producers.

Hatcheries: **2**



Vancouver Island

No hatching egg producers.

Lower Mainland

Producers:	**60**
18%	11
82%	49
Quota Holdings Conventional (Hens):	**1,758,828**
2%	32,005
98%	1,726,823
Quota Holdings Specialty (Chicks):	**4,611,372**[1]
100%	
Production (Eggs):	**128,761,054**
7%	8,517,230
93%	120,243,824
5%	5,960,010
95%	122,801,044
Hatcheries:	**9**
Small lot producers:	**0**

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[1] New quota issued to existing specialty producers who may or may not have been in the industry for 10 plus years

Appendix 1 - BC Broiler Hatching Egg Commission

Production & Statistics

Jan 1 - Dec 31, 2019

All broiler hatching egg producers must be registered, licenced and hold quota with the BC Broiler Hatching Egg Commission.

Producer Size

		# of Producers		Quota Held		Production (Eggs)	
Small	(<25,000 hens/cycle)	23	*38%*	311,131	*18%*	22,658,735	*18%*
Medium	(25,000 - 49,999 hens/cycle)	28	*47%*	932,483	*53%*	65,508,701	*51%*
Large	(50,000+ hens/cycle)	9	*15%*	515,214	*29%*	40,593,618	*31%*
	Total	**60**		**1,758,828**		**128,761,054**	

Producer Type

	# of Producers		Quota Held		Production (Eggs)	
Established Producers	49	*82%*	1,726,823	*98%*	120,243,824	*93%*
New Producers	11	*18%*	32,005	*2%*	8,517,230	*7%*
Total	**60**		**1,758,828**		**128,761,054**	

Region

	# of Producers		Quota Held		Production (Eggs)	
Lower Mainland	60	*100%*	**1,758,828**	*100%*	**128,761,054**	*100%*
Vancouver Island	0				-	
Interior	0				-	
North	0				-	
Total	**60**		**1,758,828**		**128,761,054**	

Production Type

	# of Producers		Quota Held	Production (Eggs)	
Mainstream	54	*90%*	1,758,828 Hens	122,801,044	*95%*
Specialty	6	*10%*	4,611,372 Chicks	5,960,010	*5%*
Total	**60**			**128,761,054**	

New Entrants to the Sector in 2019

- 0 through New Producer Program
- 2 through Quota Transfer
- 6 specialty producers now licensed

Hatcheries in the Sector

- 1 provincially licensed
- 10 federally licensed

Appendix 2 - BC Chicken Marketing Board

2019 Sector Overview

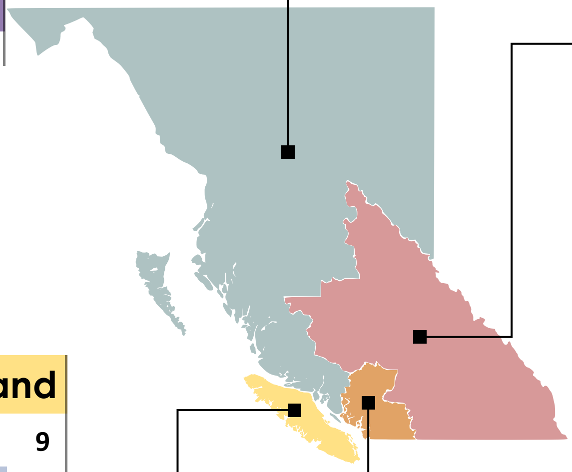
■ Established Producers ■ New Producers ■ Conventional Production ■ Specialty Production

North

Producers:	**2**
100%	2
Quota Holdings:	**27,434**
100%	27,434
Production (kg):	**168,345**
100%	168,345
100%	168,345
Processors:	**3**

Interior

Producers:	**48**
31%	15
69%	33
Quota Holdings:	**3,882,309**
15%	566,874
85%	3,315,435
Production (kg):	**31,296,127**
13%	3,935,134
87%	27,360,993
0.5%	179,758
99.5%	31,116,369
Processors:	**9**
Small Lot Producers:	**75**

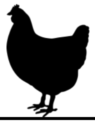


Vancouver Island

Producers:	**9**
89%	8
11%	1
Quota Holdings:	**562,067**
93%	524,417
7%	37,650
Production (kg):	**2,685,248**
91%	2,436,167
9%	249,081
100%	2,685,248
Processors:	**4**
Small Lot Producers:	**25**

Lower Mainland

Producers:	**249**
13%	33
87%	216
Quota Holdings:	**27,649,785**
4%	1,240,176
96%	26,409,609
Production (kg):	**221,139,887**
4%	7,856,406
96%	213,283,481
7%	16,448,405
93%	204,691,482
Processors:	**10**
Small Lot Producers:	**22**



Appendix 2 - BC Chicken Marketing Board

Production & Statistics

Jan 1 - Dec 31, 2019

Producers with up to 200 chickens for personal are not registered with the BC Chicken Marketing Board. Producers with less than 2,000 chickens/year require a permit. Producers with more than 2,000 chickens/year must have quota.

Producer Size

		# of Producers		Quota Held		Production (kg)	
Small	(< 50,000 kg live weight)	91	*29%*	2,688,264	8%	21,521,995	*8%*
Medium	(50,000 - 300,000 kg)	202	*66%*	23,234,003	*73%*	184,529,209	*73%*
Large	(> 300,001 kg)	15	*5%*	6,199,328	*19%*	49,238,403	*19%*
	Total	**308**		**32,121,595**		**255,289,607**	

Producer Type

		# of Producers		Quota Held		Production (kg)	
Established Producers		250	*81%*	29,762,694	93%	240,893,555	*94%*
New Producers		58	*19%*	2,358,901	*7%*	14,396,052	*6%*
	Total	**308**		**32,121,595**		**255,289,607**	

Region

		# of Producers		Quota Held		Production (kg)	
Lower Mainland		249	*81%*	27,649,785	*86%*	221,139,887	*87%*
Vancouver Island		9	*3%*	562,067	*2%*	2,685,248	*1%*
Interior		48	*16%*	3,882,309	*12%*	31,296,127	*12%*
North		2	*<1%*	27,434	*<1%*	168,345	*<1%*
	Total	**308**		**32,121,595**		**255,289,607**	

Production Type

		# of Producers		Quota Held		Production (kg)	
Mainstream		263	*85%*	31,095,787	*96%*	238,661,444	*93%*
Specialty		45	*15%*	1,025,808	*4%*	16,628,163	*7%*
	Total	**308**		**32,121,595**		**255,289,607**	

New Entrants to the Sector in 2019

- 2 through Quota Transfer.

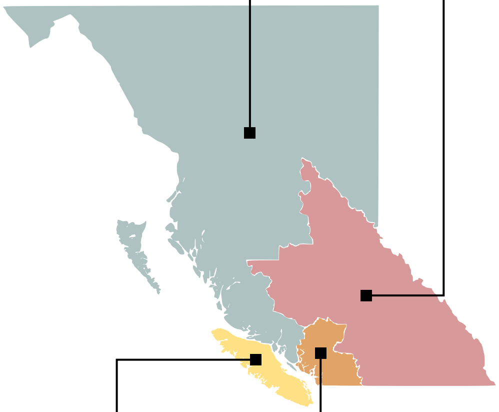
Processors in this Sector

- 17 provincially licensed
- 9 federally licensed

Appendix 3 - BC Egg Marketing Board

2019 Sector Overview

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



North

Producers: **3**

100%	3

Quota Holdings: **43,457**

100%	43,457

Production (dozen eggs)**:** **998,481**

100%	998,481
5%	47,776
95%	950,705

Small Lot Producers: **3**

Graders: **4**

Interior

Producers: **17**

41%	7
59%	10

Quota Holdings: **247,187**

17%	43,191
83%	203,996

Production (dozen eggs)**:** **6,353,795**

5%	973,605
85%	5,380,190
27%	1,713,000
73%	4,640,795

Small Lot Producers: **18**

Graders: **7**

Vancouver Island

Producers: **9**

33%	3
67%	6

Quota Holdings: **203,220**

8%	17,138
92%	186,082

Production (dozen eggs)**:** **5,317,631**

8%	443,134
92%	4,874,497
24%	1,255,693
76%	4,061,938

Small Lot Producers: **9**

Graders: **5**

Lower Mainland

Producers: **115**

37%	42
63%	73

Quota Holdings: **2,736,816**

25%	688,193
75%	2,048,623

Production (dozen eggs)**:** **74,767,400**

25%	18,380,172
75%	56,387,228
33%	24,310,159
67%	50,457,239

Small Lot Producers: **45**

Processors: **1**

Graders: **3**

Appendix 3 - BC Egg Marketing Board

Production & Statistics

Jan 1 - Dec 31, 2019

Persons with up to 99 laying hens for personal use are not registered with the BC Egg Marketing Board. Producers with 100-399 laying hens require a permit. Producers with over 399 layers must have quota.

Producer Size

		# of Producers		Quota Held		Production (Dozens)	
Small	(<6,137 hens)	36	*25%*	141,320	*4%*	3,616,495	*4%*
Medium	(6,138—27,302 hens)	72	*50%*	1,274,217	*40%*	33,673,634	*39%*
Large	(>27,303 hens)	36	*25%*	1,815,143	*56%*	50,147,178	*57%*
	Total	**144**		**3,230,680**		**87,437,307**	

Producer Type

	# of Producers		Quota Held		Production (Dozens)	
Established Producers	92	*64%*	2,482,158	*77%*	67,640,396	*77%*
New Producers	52	*36%*	748,522	*23%*	19,796,911	*23%*
Total	**144**		**3,230,680**		**87,437,307**	

Region

	# of Producers		Quota Held		Production (Dozens)	
Lower Mainland	115	*80%*	2,736,816	*85%*	74,767,400	*86%*
Vancouver Island	9	*6%*	203,220	*6%*	5,317,631	*6%*
Interior	17	*12%*	247,187	*8%*	6,353,795	*7%*
North	3	*2%*	43,457	*1%*	998,481	*1%*
Total	**144**		**3,230,680**		**87,437,307**	

Production Type

	# of Producers		Quota Held		Production (Dozens)	
Conventional	50	*35%*	1,569,384	*49%*	44,019,154	*50%*
Enriched	3	*2%*	90,059	*3%*	3,585,806	*4%*
Free Run	15	*10%*	157,776	*5%*	3,419,559	*4%*
Free Range	17	*12%*	189,789	*6%*	4,740,679	*5%*
Organic	28	*19%*	206,794	*6%*	5,206,535	*6%*
Mixed Quota	31	*22%*	1,016,878	*31%*	26,465,574	*30%*
Total	**144**		**3,230,680**		**87,437,307**	

New Entrants to the Sector in 2019

- 4 through New Producer Program
- 2 through Quota Transfer.

Processors in the Sector

- 1 provincially licensed processor in the Lower Mainland
- 19 grading stations

2019 Sector Overview

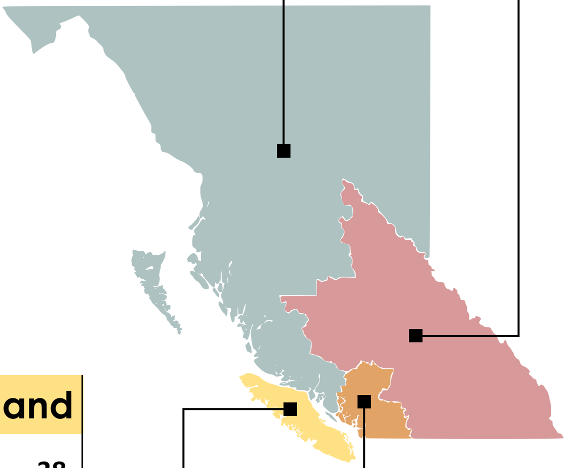
▨ Established Producers ▨ New Producers ▨ Conventional Production ▨ Specialty Production

North

Producers:	**13**
8%	1
92%	12
Quota Holdings:	**973**
4%	36
96%	937
Production (litres)**:**	**8,624,575**
4%	339,417
96%	8,285,158
100%	8,624,575
Processors:	**1**

Interior

Producers:	**93**
6%	6
94%	87
Quota Holdings:	**15,783**
2%	241
98%	15,542
Production (litres):	**136,470,511**
1%	1,705,923
99%	134,764,588
5%	7,305,096
95%	129,165,415
Processors:	**13**

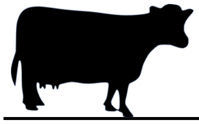


Vancouver Island

Producers:	**38**
100%	38
Quota Holdings:	**6,171**
100%	6,171
Production (litres):	**51,935,563**
100%	51,935,563
100%	51,935,563
Processors:	**7**

Lower Mainland

Producers:	**326**
12%	40
88%	286
Quota Holdings:	**72,791**
3%	2,531
97%	70,260
Production (litres):	**629,663,091**
3%	20,550,894
97%	609,112,197
5%	29,766,005
95%	599,897,086
Processors:	**31**



Appendix 4 - BC Milk Marketing Board

Production & Statistics

All producers selling milk must be registered, licenced and hold quota with the BC Milk Marketing Board.

Producer Size

		# of Producers		Quota Held		Production (litres)	
Small	(<85 kg/day CDQ)	157	*33%*	8,910	*9%*	77,779,619	*9%*
Medium	(85.1 - 185 kg/day CDQ)	152	*32%*	20,512	*21%*	171,891,849	*21%*
Large	(>185 kg/day CDQ)	161	*34%*	66,297	*69%*	577,022,272	*70%*
	Total	**470**		**95,718**		**826,693,740**	

Producer Type

	# of Producers		Quota Held		Production (litres)	
Established Producers	423	*90%*	92,910	*97%*	804,097,506	*97%*
New Producers	47	*10%*	2,808	*3%*	22,596,234	*3%*
Total	**470**		**95,718**		**826,693,740**	

Region

	# of Producers		Quota Held		Production (litres)	
Lower Mainland	326	*69%*	72,791	*76%*	629,663,091	*76%*
Vancouver Island	38	*8%*	6,171	*6%*	51,935,563	*6%*
Interior	93	*20%*	15,783	*16%*	136,470,511	*17%*
North	13	*3%*	973	*1%*	8,624,575	*1%*
Total	**470**		**95,718**		**826,693,740**	

Production Type

	# of Producers		Quota Held		Production (litres)	
Conventional	438	*93%*	91,295	*95%*	789,622,639	*96%*
Specialty	20	*4%*	2,772	*3%*	23,723,918	*3%*
Lifestyle	3	*<1%*	490	*<1%*	4,131,290	*<1%*
Specialty Lifestyle	9	*2%*	1,161	*1%*	9,215,893	*1%*
Total	**470**		**95,718**		**826,693,740**	

New Entrants to the Sector in 2019

- 2 through New Entrant Program

Processors

- 23 provincially licensed
- 29 federally licensed

Appendix 5 - BC Turkey Marketing Board

2019 Sector Overview

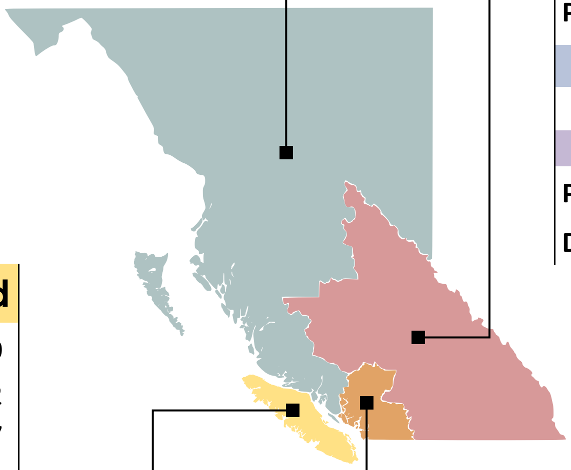
🟦 Established Producers ⬜ New Producers 🟪 Conventional Production ▫ Specialty Production

North

Producers:	**4**
100%	4
Quota Holdings:	**70,000**
100%	70,000
Production (kg):	**58,156**
100%	58,156
100%	58,156
Direct Vendor Growers:	**5**

Interior

Producers:	**3**
100%	3
Quota Holdings:	**597,193**
100%	597,193
Production (kg):	**577,888**
100%	577,888
100%	577,888
Processors:	**3**
Direct Vendor Growers:	**13**



Vancouver Island

Producers:	**9**
22%	2
78%	7
Quota Holdings:	**807,520**
6%	45,000
94%	762,520
Production (kg):	**715,480**
4%	30,325
96%	685,155
15%	108,133
85%	607,347
Processors:	**2**
Direct Vendor Growers	**16**

Lower Mainland

Producers:	**48**
17%	8
83%	40
Quota Holdings:	**25,037,048**
9%	2,132,452
91%	22,904,596
Production (kg):	**22,701,731**
9%	2,015,406
91%	20,686,325
5%	1,068,051
95%	21,633,680
Processors:	**5**
Direct Vendor Growers:	**5**

Appendix 5 - BC Turkey Marketing Board

Production & Statistics

Jan 1 - Dec 31, 2019

Producers with under 50 turkeys/year are not registered with the BC Turkey Marketing Board. Producers with under 300 turkeys/year require a permit. Producers with more than 300 turkeys/year must have quota.

Producer Size

		# of Producers		Quota Held		Production (kg)	
Small	(<100,000 kg)	23	*36%*	633,238	*2%*	535,971	*2%*
Medium	(100,001 - 687,500 kg)	26	*41%*	10,292,859	*39%*	9,344,153	*39%*
Large	(>687,501 kg)	15	*23%*	15,585,664	*59%*	14,173,131	*59%*
	Total	**64**		**26,511,761**		**24,053,255**	

Producer Type

	# of Producers		Quota Held		Production (kg)	
Established Producers	51	*80%*	23,737,116	*90%*	21,429,636	*89%*
New Producers	13	*20%*	2,774,645	*10%*	2,623,619	*11%*
Total	**64**		**26,511,761**		**24,053,255**	

Region

	# of Producers		Quota Held		Production (kg)	
Lower Mainland	48	*75%*	25,037,048	*94%*	22,701,731	*94%*
Vancouver Island	9	*14%*	807,520	*3%*	715,480	*3%*
Interior	3	*5%*	597,193	*2%*	577,888	*2%*
North	4	*6%*	70,000	*<1%*	58,156	*<1%*
Total	**64**		**26,511,761**		**24,053,255**	

Production Type

	# of Producers		Quota Held		Production (kg)	
Commercial	40	*63%*	24,397,909	*92%*	22,241,027	*92%*
Specialty	23	*36%*	2,092,790	*8%*	1,759,879	*7%*
Organic	1	*1%*	21,062	*<1%*	52,349	*<1%*
Total	**64**		**26,511,761**		**24,053,255**	

New Entrants to the Sector in 2019

- 7 through Quota Transfer.

Processors

- 6 provincially licensed
- 4 federally licensed

Appendix 6 - BC Cranberry Marketing Commission

2019 Sector Overview

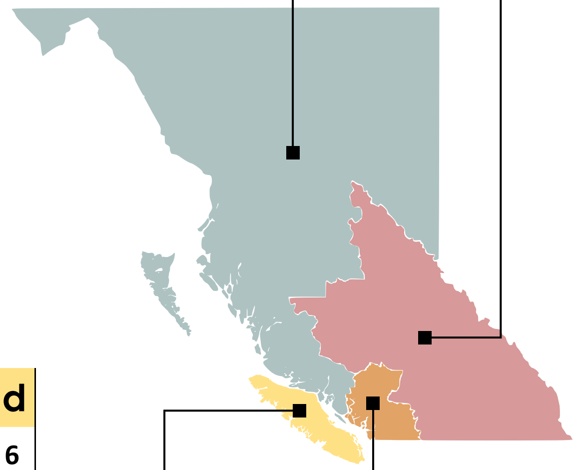
■ Established Producers □ New Producers

North

No cranberry producers.

Interior

No cranberry producers.



Vancouver Island

Producers:		**6**
□	17%	1
■	83%	5
Production (barrels):		**25,732**
□	19%	5,007
■	81%	20,725
Producer Vendors:		**1**

Lower Mainland

Producers:		**56**
□	43%	24
■	57%	32
Production (barrels):		**605,901**
□	34%	204,035
■	66%	401,866
Processors:		**4**
Producer Vendors:		**6**
Agencies:		**3**

Appendix 6 - BC Cranberry Marketing Commission

Production & Statistics

Jan 1 - Dec 31, 2019

Producers with two acres or more of production per year must be registered and licensed with the BC Cranberry Marketing Commission.

Producer Size

		# of Producers		Production (barrels)	
Small	(<35 acres)	33	*44%*	61,923	*10%*
Medium	(35-100 acres)	27	*36%*	162,191	*26%*
Large	(>100 acres)	15	*20%*	407,519	*64%*
	Total	**75**[1]		**631,633**	

Producer Type

		# of Producers		Production (barrels)	
Established Producers		37	*60%*	422.591	*67%*
New Producers		25	*40%*	209,042	*33%*
	Total	**62**		**631,633**	

Region

		# of Producers		Production (barrels)	
Lower Mainland		56	*90%*	605,901	*96%*
Vancouver Island		6	*105*	25,732	*4%*
Interior		0	-	0	
North		0	-	0	
	Total	**62**		**631,633**	

Production Type

- No specialty production types reported for cranberry production.

New Entrants to the Sector in 2019

- 1 new entrant.

Processors

- 4 federally licensed.

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[1] Reported data is for licensed farms.

Appendix 7 - BC Hog Marketing Commission

2019 Sector Overview

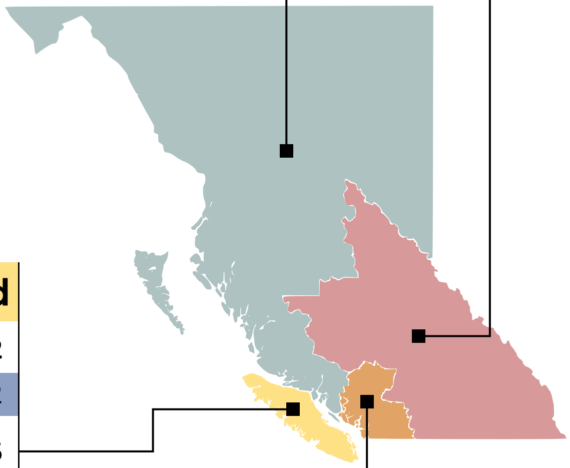
🟦 Established Producers 🟪 Conventional Production ▨ Specialty Production

North

Producers:	**2**
🟦 100%	2
Production (sows):	**950**
🟦 100%	950
🟪 100%	950
Processors:	**4**

Interior

Producers:	**1**
Processors:	**14**

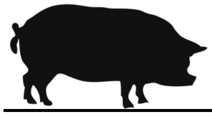


Vancouver Island

Producers:	**2**
🟦 100%	2
Production (sows):	**115**
🟦 100%	115
🟪 100%	115
Processors:	**4**

Lower Mainland

Producers:	**9**
🟦 **100%**	9
Production (sows):	**5,765**
🟦 100%	5,765
🟪 100%	5,765
Processors:	**3**



Appendix 7 - BC Hog Marketing Commission

Production & Statistics

Jan 1 - Dec 31, 2019

Producers marketing 300 or more commercial hogs per year from their farm must be registered and licensed with the BC Hog Marketing Commission.

Producer Size

		# of Producers		Production (sows)	
Small	< 299 sows	3	*22%*	115	*<1%*
Medium	300-999 sows	9	*64%*	2,815	*42%*
Large	1000+ sows	2	*14%*	3,900	*57%*
	Total	**14**		**6,830**	

Region

	# of Producers		Production (sows)	
Lower Mainland	9	*64%*	5,765	*84%*
Vancouver Island	2	*14%*	115	*<1%*
Interior	1	*0%*	0	*0%*
North	2	*14%*	950	*14%*
Total	**14**		**6,830**	

Production Type

	# of Producers		Production (sows)	
Farrow to Finish	7	*47%*	5,660	*83%*
Finisher	3	*20%*	N/A	
Round Hogs	2	*13%*	1,055	*15%*
Direct Farm Marketing	3	*20%*	115	*2%*
Total	**15**[1]		**6,830**	

[1] One producer produces both farrow to finish and round hogs.

New Entrants to the Sector in 2019

- No new entrants.

Processors

- 24 provincially licensed
- 1 federally licensed

Appendix 8 - BC Vegetable Marketing Commission

2019 Sector Overview

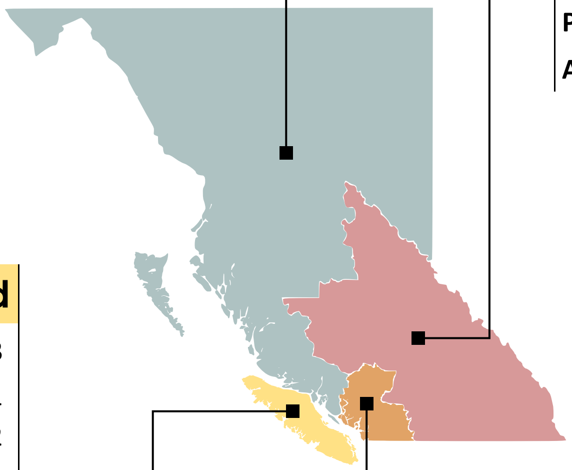
🟦 Established Producers   ▨ New Producers

North

The BC Vegetable Marketing Commission does not regulate vegetables north of the 53rd parallel.

Interior

Producers:	**19**
100%	19
Production:	**-**
Storage Crop	9,848 tons
Greenhouse	56,278 M^2
Producer Vendors:	**4**
Agencies:	**1**



Vancouver Island

Producers:	**23**
4%	1
96%	22
Production:	-
Storage Crop	3,283 tons
Greenhouse	62,044 M^2
Processors:	**1**
Producer Vendors:	**9**
Agencies:	**2**

Lower Mainland

Producers:	**98**
6%	6
94%	92
Production:	-
Storage Crop	75,367 tons
Greenhouse	2,982,573 M^2
Processors:	**10**
Producer Vendors:	**7**
Agencies:	**7**

Appendix 8 - BC Vegetable Marketing Commission

Production & Statistics

Jan 1 - Dec 31, 2019

Greenhouses under 5,000m^2 and producers with less than one tonne of regulated product in one year are not registered with the BC Vegetable Marketing Commission.

Regulated vegetables include: 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. Processing crops: beans, broccoli, Brussels sprouts, cauliflower, corn, peas, strawberries.

Producer Size

		# of Producers		Storage Crop Production (tons)		Greenhouse (M^2)	
Small	To 200 tons/<6K M^2	42	*30%*	1,904	*2%*	5,070	*<1%*
Medium	200–1K tons/6K M^2	57	*41%*	16,428	*19%*	719,136	*23%*
Large	1K+ tons/60K+ M^2	41	*29%*	70,166	*79%*	2,376,688	*77%*
	Total	**140**		**88,498**		**3,100,895**	

Producer Type

	# of Producers		Storage Crop Production (tons)		Greenhouse (M^2)	
Established Producers	133	*95%*	88,498	*100%*	3,051,445	*98%*
New Producers	7	*5%*	-		49,450	*2%*
Total	**140**		**88,498**		**3,100,895**	

Region

	# of Producers		Production (tons)		Greenhouse Production (M^2)	
Lower Mainland	98	*70%*	75,367	*85%*	2,982,573	*96%*
Vancouver Island	23	*16%*	3,283	*4%*	62,044	*2%*
Interior	19	*14%*	9,848	*11%*	56,278	*2%*
North	-		-		-	
Total	**140**		**88,498**		**3,100,895**	

Production Type

	# of Producers		Production	
Greenhouse	67	*48%*	3,100,895 M^2	*N/A*
Storage Crop	73	*52%*	88,498 tons	*N/A*
Total	**140**		**-**	

New Entrants to the Sector in 2019

- 4 new entrants

Processors

- 11 provincially licensed

CONTACT INFORMATION

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