

2021 Organic Sector Survey/ Enquête sur le secteur biologique Market Analysis/ Analyse de marché Question 8

- What do you believe are the greatest supply chain challenges to the growth of organic distribution or importing? (select all that apply)
- Selon vous, quels sont les principaux défis liés à la chaîne d'approvisionnement qui influent sur la croissance de la distribution ou de l'importation de produits biologiques? (Sélectionnez tout ce qui s'applique)

Answer Choices

Access to certified organic co-packer(s) /

Accès à des conditionneurs certifiés biologiques: **29.79% (98)**

Access to dependable supply of domestic organic raw materials (farm products) /

Accès à des matières premières biologiques locales (produits agricoles): **45.90% (151)**

Access to dependable supply of any organic raw materials (farm products) /

Accès à un approvisionnement fiable en toute matière première biologique (produits agricoles): **33.43% (110)**

Access to dependable supply of any processed organic ingredients/products /

Accès à un approvisionnement fiable en ingrédients/produits biologiques transformés: **21.58% (71)**

Access to dependable supply of domestic processed organic ingredients/products /

Accès à un approvisionnement fiable en ingrédients/produits biologiques transformés de source locale: **27.05% (89)**

Access to dependable supply of minor organic ingredients, additives and/or processing aids / Accès à un approvisionnement fiable en ingrédients, additifs et/ou auxiliaires de production permis en production biologique: **17.02% (56)**

Access to dependable supply of non-organic inputs approved for organic (minor ingredients, sanitizers, pest control) / Accès à un approvisionnement fiable en intrants non biologiques approuvés pour l'agriculture biologique (ingrédients mineurs, désinfectants, contrôle des organismes nuisibles): **15.20% (50)**

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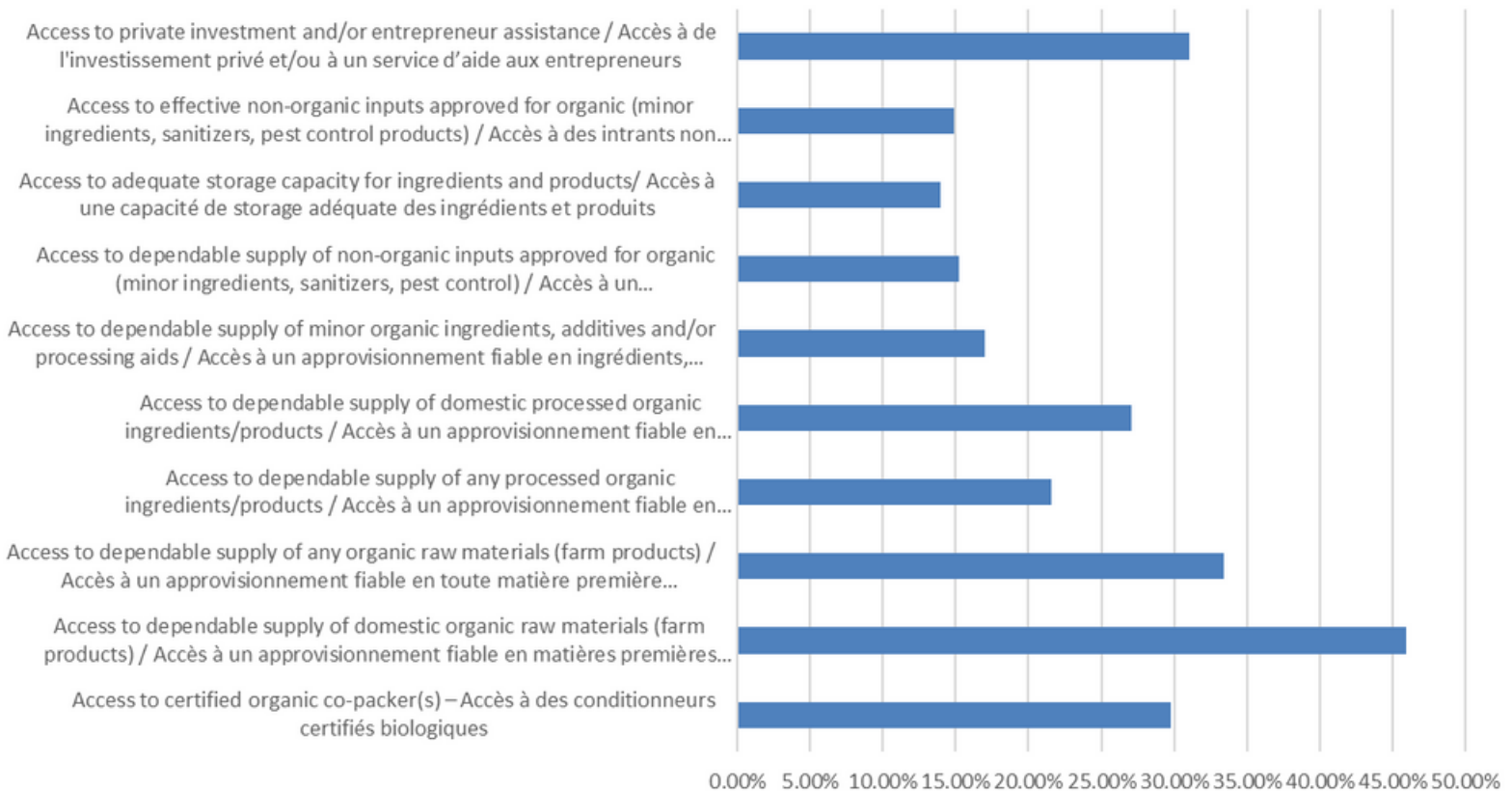
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Access to adequate storage capacity for ingredients and products/ Accès à une capacité de storage adéquate des ingrédients et produits: **13.98% (46)**

Access to effective non-organic inputs approved for organic (minor ingredients, sanitizers, pest control products) / Accès à des intrants non biologiques efficaces et approuvés pour l'agriculture biologique (ingrédients mineurs, assainissants, contrôle des organismes biologiques): **14.89% (49)**

Access to private investment and/or entrepreneur assistance / Accès à de l'investissement privé et/ou à un service d'aide aux entrepreneurs: **31.00% (102)**

Greatest Supply Chain Challenges to the Growth of Organic Production



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Comments / Commentaires 52

Note: The comments below were submitted to the survey by individuals, and do not reflect the views of the Organic Federation of Canada, Canadian Organic Trade Association, the Organic Agriculture Centre of Canada or the Canadian Organic Growers.

Remarque : Les commentaires publiés ci-dessous ont été soumis par les participants au sondage et ne reflètent nécessairement pas le point de vue de la Fédération biologique du Canada, de l'Association canadienne du commerce biologique, Centre d'agriculture biologique du Canada, ou de Cultivons Biologique Canada.

- Compost that is actually organic.
- Approvisionnement en matière première bio à un coût compétitif.
- Réciprocité des normes canadiennes et ceux des autres pays
- More communication along the supply chain will encourage new startups, public/private partnerships, more support through CSA programs and other initiatives to increase support for organic farming, regeneration, agro-forestry, etc
- Access to seeds, insect netting, biological pest controls, and access to Farmers Markets during a pandemic to sell direct to consumer.
- I am not sure
- I would have preferred to not answer, as I am a farmer, not an importer.
- All the above seem relevant, especially that my perception is that organic products come mainly from smaller family farms and because of our climate may not be available all year. Of course what cannot be grown in the country must be imported and I suspect that it's the same problem elsewhere, and therefore it increases costs to consumers that not everyone can afford, limiting the market demand.
- 99% of my farm is organic but my animals receive a small amount of corn for extra nutrition trying to find non GMO corn is extremely difficult
- Lack of organic Processing capacity
- None of these are barriers for us.
- I don't know enough about that topic to specify
- None of the above
- Genetic material at this point, for sure. That's a worldwide issue. Organic growers also concentrate on the few cash crops, though, often. POLICY ISSUE!
- no idea either, as i am not involved in this step

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- Not sure – not really involved in this aspect
- Access to OMRI-certified compost in rural BC and funding for new small farmers
- Not my area. no comment
- Growing demand for chemical residue free products
- If we are to make this sustainable and make inroads into the industrial grown food we need good access to local organic inputs at an affordable price in order to be competitive.
- NONE OF THE ABOVE ARE APPLICABLE IN OUR SITUATION
- We are pretty small, only sell what we grow, and just sell locally, so this question doesn't apply to us very well.
- Crop insurance recognition .
- I was told " we don't like tree huggers "
- I had to find a definition , suited to the prairies.
- n/a
- Don't know enough about this to comment
- The ridiculous amount of fees and the fees upon fees. Why do we have to pay fees strictly on sales and not similar to the gst, if the input like seeds are certified organic by the grower, they pay, then if sold through a seed company like Johnny's then they pay organic fees, then I pay fees. So I should be able to only have to pay on net profit if any and no more.
- N/A
- Unsure
- not my area of knowledge/expertise – I responded in the way I did because there wasn't an 'I don't know' or 'other' box to click.
- Land is scarce
- Not my area of strength....
- Competing with the industrialized global food system
- slaughterhouses – or preferably on farm slaughtering
- None for me so I just clicked the first because an answer was required
- not familiar with value added
- My first year cropping was last year (COVID). We only sold from our farm, had no access to Farmers Market tables. Not at first, and then no chance to get a table because we are new to the area.

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- Conventional mindset is big quantities. It is difficult to get priority to clean/transport/store/sell/buy small quantities. Distance from the farm to a flour mill or certified organic seed supplier or grain cleaner or slaughter/processing plant increase travel costs/time away from farm/lack of price options(for farmer in buying or selling scenarios).
- access to adequate market place
- Access to reliable, local quality compost that is certain to be free of persistent herbicides. Grazon should be illegal.
- COST!
- Unsure
- Food safety certified and organic certified cleaners/bagger facility in Saskatchewan
- Food grade cleaning
- Ma réponse parce qu'il en faut une pour poursuivre le sondage. Ces enjeux ne concernent pas les producteurs bio-intensifs qui font de la mise en marché de proximité. Ils constituent pourtant un % important de la production bio. S'ils sont ignorés jusque dans les questionnaires de sondage c'est mal parti.
- dealing with loose US organic standards
- Crop processors in BC....that can clean and dehull grain and pulses and oilseeds and separate intercropped crops like peas and grains.
- Access to curricula/professional advice on the application of the principals of ecology to organic production
- I have owned a organic food store for 24 years and have seen a huge increase in the availability of products, I really start to wonder where it is all coming from because as a producer this does not seem possible and that the standards are being minimized by pressure of the major marketers.
- as we are not a manufacturer, don't believe we are well positioned to fully answer this question
- Grain drying/processing, and local abattoirs in the eastern provinces is a large impediment to the growth of these sectors for the region
- More hands on deck: youth employability
- Retailers and others who make money from organic products should be required to be certified organic and/or pay into the organic sector (without strings attached) to help fund organic activities like the standards, research, etc.

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- I am unsure, I am not involved in organic exporting
 - prix trop élevé par les intermédiaires qui vendent bio= consommateurs limités en bout de ligne
 - Threat of foreign produced organic commodities that aren't properly scrutinized for conformity to Canadian standards
 - non-tariff trade barriers
 - distribution of product
 - Better organic fertilizers needed
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- Start up money for small businesses is very hard to come by.
 - increased local consumption of locally produced organic produce can decrease the need for export or import.
 - Access to markets for a larger variety of organic grains. Many terminals and buyers only have capacity for oats, wheat, rye, and barley. Need access for specialty grains such as ancient grains, old varieties of grains such as wheat, and other specialties such as Einkorn
 - Difficult to access government funding for small business.
 - In produce, the biggest challenges are packing/storage infrastructure well suited for long term storage (which could increase our market access to storage crops incredibly), access and availability to certified organic seed that is OP, productive, and suited for local regions, and knowledge/training to help our growers continue their development as stewards of the land.
 - I understood "organic co-packers" to mean packaging, for retail, for example.
 - To be truly organic, production and consumption of both inputs and outputs must by their Nature be local. There should be zero growth in distribution beyond a small (200Km ? area).....
 - We must continue to work with other countries in developing partnerships with expansion for equivalency arrangements. We must protect our organic Canadian farmers ensuring they can grow and sell organic products profitably instead of importing organic grains at unrealistic low prices that hurt Canadian farmers.
 - Don't know.
 - Le principal défis est d'avoir des consommateurs
 - Realizing that that's not the issue. The original goal was to have as little outside inputs as possible, Wasn't it?