2021 Organic Sector Survey/ Enquête sur le secteur biologique

Market Analysis/ Analyse de marché

Question 9

- **What do you believe are the greatest market access and marketing challenges for organic? (Select all that apply)**

- **Selon vous, quels sont les plus grands défis liés à l'accès au marché et à la commercialisation des produits biologiques? (Sélectionnez tout ce qui s'applique)**

Answer Choices/ Responses

Consumer awareness outlining the benefits and value of organic (including embedded claims such as non-GMO, cage-free, etc.) / Sensibilisation des consommateurs aux avantages et à la valeur du bio (y compris les allégations intégrées telles que 'sans OGM', 'sans cage', etc.): **61.09% (201)**

Consumer trust in integrity of organic label / Confiance du consommateur en l'intégrité du label biologique: **51.37% (169)**

Organic pricing / Prix des produits biologiques: **55.32% (182)**

Organic market data/information / Données/informations sur le marché biologique: **17.93% (59)**

Access to organic products/ Accès aux produits biologiques: **19.45% (64)**

Access to markets (wholesalers/distributors/buyers) / Accès aux marchés (grossistes/distributeurs/acheteurs): **27.96% (92)**

Access to direct-to-consumer markets / Accès aux marchés de vente directe aux consommateurs: **20.06% (66)**

Access to export markets / Accès aux marchés de l'exportation: **12.77% (42)**

Downward price pressure from less expensive and/or imported organic products/ Pression à la baisse des prix par des produits biologiques moins chers et/ou importés: **56.53% (186)**

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Mandatory programs that don't support organic marketing (e.g. Commodity Check-Off, Federal Milk Marketing)/Les programmes obligatoires qui ne soutiennent pas la commercialisation des produits biologiques(par exemple, les contributions sur les produits agricoles, les programmes fédéraux de la commercialisation du lait): **32.52% (107)**

Threats of contamination from genetically-modified organisms, pesticides, or other materials prohibited by organic regulations / Menaces de contamination par des organismes génétiquement modifiés, des pesticides ou d'autres matériaux interdits par la réglementaton biologique: **38.91% (128)**

Restrictive commodity quotas / Quotas restrictifs sur les produits: **10.94% (36)**
Lack of organic market data / information / Manque de données/informations sur le marché des produits biologiques: **18.54% (61)**

Shelf-space competition with products marketed as "local", “natural” and/or “non-GMO” or "regenerative" / Concurrence sur les tablettes avec des produits commercialisés comme "locaux", "naturels" et/ou "non-OGM" ou "agriculture régénératrice’: **40.12% (132)**

Proliferation of unregulated organic marketing claims / Prolifération des allégations publicitaires relatives aux produits non soumis à la réglementation biologique: **39.21% (129)**

Comments / Commentaires: **43**
Answered/ Ont répondu: **329**
Skipped/ N’ont pas répondu: **490**

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Comments / Commentaires 43

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 ou, le Centre d'agricultures biologique du Canada de Cultivons Biologique Canada.

- Futures markets for organic communities.
- The greatest challenge is the failure of governments to support the organic sector with subsidies for certification and subsidies for organic processing capacity
- Proliferation of unregulated "regenerative" marketing claims.
- What is regenaritive agriculture and why is organic allowing it to take over. No standards but seems to be what everyone wants?
- New movement for Regenerative certification
- The belief that all farmers at market (direct to consumer sales) are organic. Educating people on the effects of non organic farming.
- Greenwashing is difficult to address without overly restrictive regulations.
- Our customers ask about local before organic.
- What does "natural" even mean! Arsenic is a natural product!!
- Organic pricing is a marketing challenge, but mostly when compared to the prices of non-organic. Prices are too low, some prices are so low it is insane.
- I no longer participate in marketing as "Organic " . Retired.
- I will obstain from answering 14 below.
- It bothers me that some of your questions sound like they are against supply management. There are a lot of ways dairy and poultry supply management systems support and promote organic production, while preventing overproduction that causes prices to fall below the cost of production. I would be very opposed to any attempt by COG to undermine supply management - better to work with the marketing boards to increase opportunities for organics within supply management.
- Consumer education is high on my list
- Fees, too many fees and different organizations

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- Improper use of the term 'organic' in Ont and Alberta.
- Confusing use of the term 'organic' in the cannabis market - there is no good reason to grow this crop indoors and new research shows that the production of 1 once of conventional indoor cannabis produces 250lbs of co2 - that is equivalent to 50 litres of gas!
- lack of volume of products to sell per producer
- lack of product availability over time (weeks vs month)
- Lack of uniformity in the products from farm to farm (cultivars, size, shape, quality)
- Shelf-space competition and consumer confusion are most serious.
- Only one year in organic farming so far, and it was 2020.
- Weak integrity of the organic label hurts the whole industry ie.70% organic...well then it really isn't organic right? Glyphosate free should become a criteria for certification ie. organic canola oil ??? These added parts then weaken the integrity of the organic product and resulting benefits to health.
- The realization that "organic" might not be the "be-all, end-all" .q
- Organic has been detached from local - organic needs to come back to local/regional.
- Big ag & fed/prov. gov't again and again and again do not support organic which tends to be smaller farm players.
- Je pense que le prix est l'un des plus gros enjeux, car le consommateur n'a pas toujours le budget attitré pour des produit pouvant être 2 à 3 fois plus cher. et ceux qui ont ce choix, souvent vont favoriser le coté économique plutôt7 que Biologique
- I don't know
- I know the process from start to finish and it seems that organic is highly regulated at the farm. I Don't know how Earth Bound brand can produce, distribute and sell both organic and non organic. Are the warehouses where save on breaks down the pallets of tomatoes for store distribution a certified space? Organic in my opinion is about INTEGRITY, i think it is being eroded
- Local organic product prioritization.
- One of Organic's unique value propositions was (and should be) the partnership with consumers. They should have a stronger voice at Organic Standards meetings and in organic organizations. Rather than copying conventional Ag by trying to get "public trust" we should be making sure that the public's voice is always requested, heard, and respected.

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- i grow 20-30 ac of flax a year, most buyers want a semi load (minimum 1000bus) which can take 2-4 years to produce. This means no revenue and risk of loss of quality from moisture and or bugs!
- I am not "certified" organic but I follow the rules associated with organic certification and go beyond them. I think that if the organic sector wants to survive, the inspections need to be free. If it was free, other farmers like myself would join the Certified Organic sector and grow that body of organics in this province which would give us a bigger piece of the pie when lobbying for gov't regulations etc. As an non certified organic grower, I feel that the organic growers are looking down on us non-certified farms. Somehow we need to figure out how to stand as a unified group!
- I think a big problem is that decision makers or leaders in agriculture/food have misconceptions about organics and share that with people that trust them. For example, when I was at university, I had Science (not agriculture) professors talk about how silly the non-GMO movement was and that from a scientific standpoint, GMOs are not harmful. They said that organics was essentially a scam. However, when you talk to people about the political, social, and economic reasons to support organics and to not support GMOs, they see the value in it. Professors have a lot of power and what they say about organics impacts a lot of consumers. Additionally, I have heard dieticians talk about how "anything can be organic". I don't think these people are willfully ignorant about organics, I just think this is what they know. Although these are anecdotes, I think it does speak to the larger issue of people in influence or power who may not be fully informed about organics and are influencing others to not trust organics or to believe in misinformation. Overall, I think it's important we work with these people in power (dietitians, professors, nutritionists, etc.) and share the appropriate information.
- There are so many competing claims (Non-GMO Verified, Sustainable, Free-Run, Grass-Fed, Regenerative) that are well advertised, but which do not require the same rigour as the organic standard, and are not federally regulated. These competing claims chip away at what "organic" means to a consumer.
- There needs to be more CFIA enforcement to root out bad actors both domestic and on imported products.
- It’s not only imports that are driving downward prices, it’s also increasing domestic supply for some ingredients

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- L'agriculture régénératrice est la grande menace au secteur biologique, car elle sera capable de chiffrer son apport à l'environnement et le consommateur a une conception flou de la certification bio : 8 % des consommateurs américains savent que bio veut aussi dire sans OGM.
- Most of the above choices are smoke and mirrors, based on an economic system which is serving our relationship to Mother Earth (and ultimately our species), very poorly. We need to renew a much older paradigm.......
- Not sufficient local produce available. People who buy organic don't want the imports.
- Consumers don't realize that Non-GMO and Certified Organic are not the same and think Non-GMO is just the same and buy the cheaper product. Mfg put both logos on their products to attract consumers.
- i do not actually know--this is from my window of the world
- We need to get every province and territory to adopt the federal organic standards so that the use of the term organic within provincial borders can be regulated.
- A producer in my community who used to be certified organic, but let their certification lapse a few years ago, continues to use "Organics" in their name. I and others have reported this, but it appears nothing can be done about it? Because "Organics" is part of their registered name I'm told.
- The government overhaul of the seed regulatory system seemingly in favour of the private plant breeder

- Lack of acceptance of GMO or similar technologies in organic systems is limiting this space.
- The quota system is of great benefit to Canadians. However it makes it challenging to new entrants, and direct marketing (especially organic) becomes cost prohibitive for farmers.
- Politiques protectionnisme des USA
- Lack of consumer understanding of the difference between organic and otherclaims. Not just in terms of shelf space but also in terms of head space and support for local direct growers.
- not all commodity check-off organizations are mandatory and when organic levy payers in refundable check-poff systems speak up, their needs are recognized and funding channels explored, for example organic marketing programs.