
MINISTRY OF AGRICULTURE

2013/14 ESTIMATES

Vote 14: Ministry Operations

Vote 15: Agricultural Land Commission

Statutory Appropriations

MINISTRY OF AGRICULTURE

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MINISTRY OF AGRICULTURE

ESTIMATES HIGHLIGHTS

OPERATING BUDGET:

2012/13 Restated, \$68.143M, increased \$2.355M or 3.6% from 2012/13 Estimates:

- \$2.638M increase for the Meat Inspection program that was transferred from the Ministry of Health (HLTH).

offset by:

- (\$0.283M) decrease for the Range Policy program that was transferred to the Ministry of Forests, Lands and Natural Resource Operations (FLNRO).

2013/14 Estimates, \$79.307M, increased \$11.164M or 16.4% from 2012/13 Restated:

- \$4.039M increase for the Meat Inspection program transferred from HLTH.
- \$0.931M budget increase for the Agricultural Land Commission to support their new regulatory fees/revenues structures.
- \$6.5M budget increase for the Greenhouse Carbon Tax Rebate program.

offset by:

- (\$0.306M) decrease for expenditure management savings target.

CAPITAL BUDGET:

2012/13 Restated, \$0.290M, remains the same as 2012/13 Estimates:

- No change.

2013/14 Estimates, \$0.355M, increased \$0.065M or 22.4% from 2012/13 Restated:

- \$0.065M increase for Emergency Lab Database.

Staff & Full-Time Equivalents (FTEs):

- FTEs continue to be budgeted at a summary level for the Province.
- Historical number of staff as follows:
 - 2008/09, 889
 - 2009/10, 385
 - 2010/11, 385
 - 2011/12, 339
 - 2012/13, 321
- Current FTE burn is 311.1, prior year burn was 321.3
- Current number of auxiliary employee is 28, breakdown as follows:
 - Innovation & Industry Development, 0
 - Agrifood Policy and Legislation, 2
 - Plant & Animal Health, 9
 - Growing Forward, 7
 - Business Risk Management, 2
 - Sustainable Agriculture Management, 2
 - Agricultural Land Commission, 6

**MINISTRY OF AGRICULTURE
THREE YEAR BUDGET CHANGES
OPERATING**

	\$Millions			
	2012/13 Restated	2013/14 Estimates	2014/15 Planned	2015/16 Planned
February 2012 Plan				
Vote 14 - Ministry Operations	52.314	52.314	52.314	52.314
Vote 15 - Agricultural Land Commission	1.974	1.974	1.974	1.974
Special Account - Production Insurance	18.500	18.500	18.500	18.500
<i>Less: PI Transfer from Ministry Operations Vote</i>	(7.000)	(7.000)	(7.000)	(7.000)
Total February 2012 Plan	65.788	65.788	65.788	65.788
Vote 14 - Budget Lifts and Reductions				
Range Policy Program to FLNRO	(0.283)	(0.283)	(0.283)	(0.283)
Expenditure Management Savings Target		(0.306)	(0.306)	(0.306)
PISA Contribution	-	1.800	1.800	1.800
Meat Inspection Program from HLTH	2.638	6.677	5.592	5.592
Greenhouse Carbon Tax Rebate Program	-	6.500	6.500	6.600
Total Budget Lifts and Reductions	2.355	14.388	13.303	13.403
Vote 15 - Budget Lifts and Reductions				
Agricultural Land Commission -Budget Lifts	-	0.931	1.542	1.417
Total Budget Lifts and Reductions	-	0.931	1.542	1.417
PISA - Budget Lifts and Reductions				
Transfer from Ministry Operations Vote	-	(1.800)	(1.800)	(1.800)
Total Budget Lifts and Reductions	-	(1.800)	(1.800)	(1.800)
Operating Budget Targets, February 2013 Plan				
Vote 14 - Ministry Operations	54.669	66.702	65.617	65.717
Vote 15 - Agricultural Land Commission	1.974	2.905	3.516	3.391
Special Account - Production Insurance	18.500	18.500	18.500	18.500
<i>Less: Transfer from Ministry Operations Vote</i>	(7.000)	(8.800)	(8.800)	(8.800)
TOTAL BUDGET TARGETS	68.143	79.307	78.833	78.808
 <i>Change from 2012/13 Service Plan:</i>	 2.355	 13.519	 13.045	 13.020
<i>Percentage Changes:</i>	3.6%	20.5%	19.8%	19.8%
 <i>Change in 2013/14 Service Plan:</i>		 11.164	 (0.474)	 (0.025)
<i>Percentage Changes:</i>		16.4%	(0.6%)	(0.0%)

MINISTRY OF AGRICULTURE

THREE YEAR BUDGET CHANGES

CAPITAL

\$Millions

	2012/13 Restated	2013/14 Estimates	2014/15 Planned	2015/16 Planned
February 2012 Plan:				
Vote 14 - Ministry Operations	0.290	0.495	0.593	0.593
Total February 2012 Plan	0.290	0.495	0.593	0.593
Budget Lifts and Reductions				
Vehicles	-	(0.140)	-	-
Information Systems	-	-	-	(0.025)
Total Budget Lifts and Reductions	-	(0.140)	-	(0.025)
Capital Budget Targets - February 2013 Plan:				
Vote 14 - Ministry Operations	0.290	0.355	0.593	0.568
TOTAL BUDGET TARGETS	0.290	0.355	0.593	0.568
<i>Change from 2012/13 Service Plan:</i>	-	(0.140)	-	(0.025)
<i>Percentage Changes:</i>	-	(28.3%)	-	(4.2%)
<i>Change in 2013/14 Service Plan:</i>		0.065	0.238	(0.025)
<i>Percentage Changes:</i>		22.4%	67.0%	(4.2%)

2013/14 Estimates Budget:

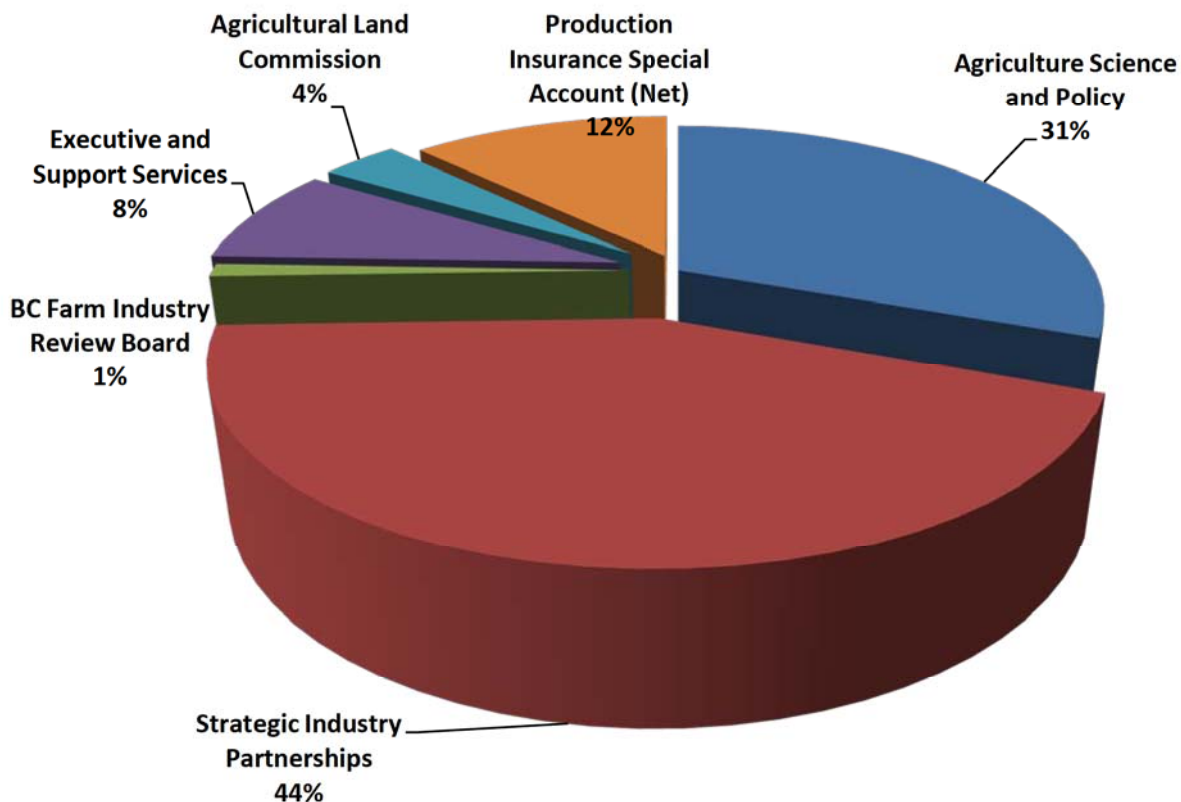
February 2013 Plan:

- \$0.003M Furniture and Equipment
- \$0.212M Mandatory Operating Equipment
- \$0.140M Information Systems for Emergency Lab Database

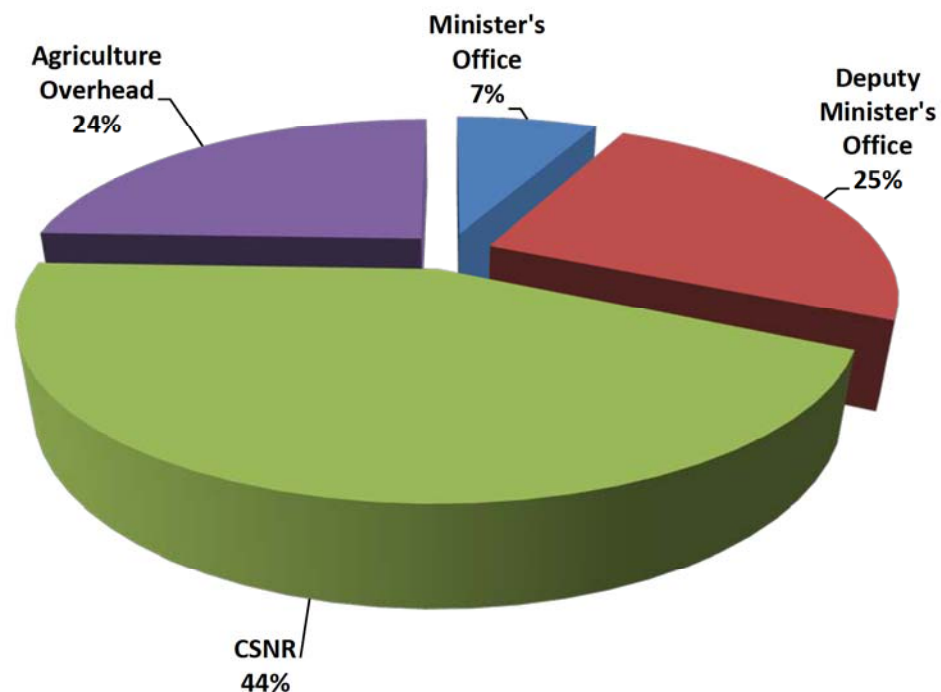
MINISTRY OF AGRICULTURE
3 YEAR BUDGET - CAPITAL
2012/13 to 2015/16
(\$000s)

Asset Category	2012/13 Estimates	Change	2012/13 Restated	Change	2013/14 Estimates	Change	2014/15 Planned	Change	2015/16 Planned
Specialized Equipment	212	-	212	-	212	-	212	-	212
Office Furniture & Equipment	3	-	3	-	3	-	3	-	3
Vehicles	-	-	-	-	-	353	353	-	353
Information Systems	75	-	75	65	140	(115)	25	(25)	-
MINISTRY TOTAL	290	-	290	65	355	238	593	(25)	568
<i>TOTAL Percent Change by year</i>					22.4%		67.0%		(4.2%)

MINISTRY OF AGRICULTURE 2013/14 PLANNED EXPENDITURES BY CORE BUSINESS



Executive & Support Services



MINISTRY OF AGRICULTURE
2012/13 STOB 77 TRANSFERS - GRANTS
(\$000s)

	Approved	2012/13 Estimates	Actuals/ Forecast	(Over)/ Under	2013/14 Funded
Agriculture Science and Policy ⁽¹⁾	59	59	19	40	9,159
Strategic Industry Partnerships ⁽²⁾	19,823	19,823	19,823	-	13,823
	19,882	19,882	19,842	40	22,982
Agriculture Science and Policy					
Growing Forward	59	59	19	40	59
Greenhouse Carbon Tax Rebate Program	-	-	-	-	6,500
Meat Inspection Program ⁽¹⁾	-	-	-	-	2,600
Strategic Industry Partnerships					
B.C. 4-H Provincial Council	87	87	87	-	87
AgriStability Trust ⁽²⁾	19,736	19,736	19,736	-	13,736
	19,882	19,882	19,842	40	22,982

Notes:

(1) 2013/14: includes \$2.6M transfer for the Meat Inspection Program from the Ministry of Health.

(2) 2013/14: reflects a decrease of \$6.0M as a result of Growing Forward 2.

MINISTRY OF AGRICULTURE
MINISTRY GROUP ACCOUNT CLASSIFICATION SUMMARY
Includes Operating, ALC and PISA
(\$000s)

Group Account Classification	2012/13	% of Total	2013/14	% of Total	Change	
	Restated	Restated	Estimates	Estimates	\$	%
Salaries and Benefits	26,940	39.5%	30,688	38.7%	3,748	13.9%
Operating Costs	11,040	16.2%	13,448	17.0%	2,408	21.8%
Government Transfers	27,748	40.7%	30,786	38.8%	3,038	10.9%
Other Expenses	23,341	34.3%	25,787	32.5%	2,446	10.5%
Internal Recoveries	(9)	-	(9)	-	-	-
External Recoveries	(20,917)	(30.7%)	(21,393)	(27.0%)	(476)	2.3%
	68,143	100.0%	79,307	100.0%	11,164	16.4%

Salaries and Benefits increased \$3.748M

This increase includes:

- \$2.810M increase for the Meat Inspection program transferred from HLTH.
- \$0.662M increase as a result of Growing Forward 2.
- \$0.048M increase as a result of the recent STOB realignment.
- \$0.500M increase for Agricultural Land Commission to support the new the fees/revenues structures.

Offset by:

- (\$0.272M) decrease for the Range Policy program transferred to FLNRO.

Operating Costs increased \$2.408M

This increase includes:

- \$1.267M increase for the Meat Inspection program transferred from HLTH.
- \$0.862M increase as a result of Growing Forward 2.
- \$0.123M increase as a result of the recent STOB realignment.
- \$0.431M increase for Agricultural Land Commission to support the new fees/revenues structures.

Offset by:

- (\$0.264M) decrease for the expenditure management savings target.
- (\$0.011M) decrease for the Range Policy program transferred to FLNRO.

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MINISTRY GROUP ACCOUNT CLASSIFICATION SUMMARY (Cont.)

Government Transfers increased \$3.038M

This increase includes:

- \$2.6M increase for the Meat Inspection program transferred from HLTH.
- \$6.5M increase for the Greenhouse Carbon Tax Rebate program.

offset by:

- (\$3.824M) decrease as a result of Growing Forward 2.
- (\$2.238M) decrease as a result of the recent STOB realignment.

Other Expenses increased \$2.446M

This increase includes:

- \$2.6M increase as a result of Growing Forward 2.

offset by:

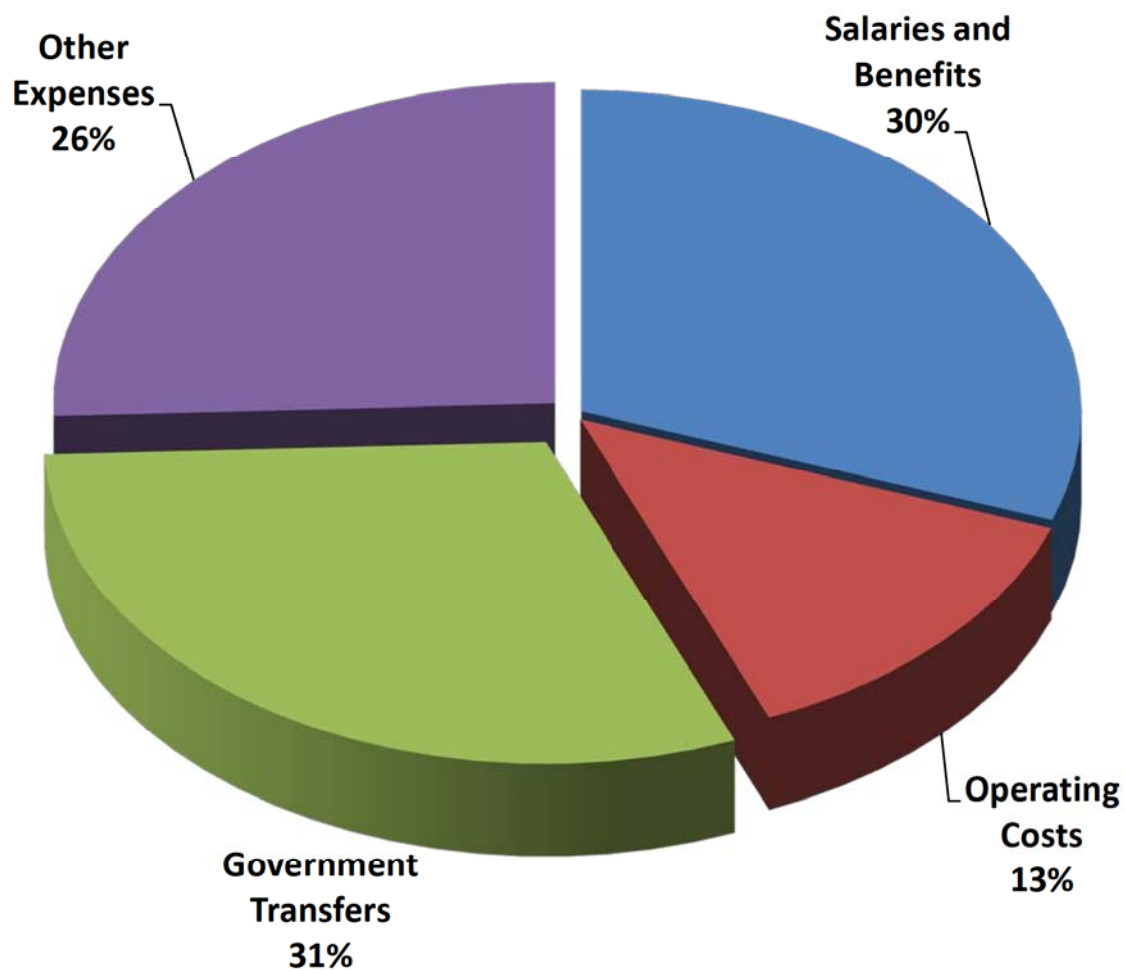
- (\$0.042M) decrease for the expenditure management saving target
- (\$0.112M) decrease as a result of the recent STOB realignment.

Internal Recoveries - no change

External Recoveries increased \$0.476M

- \$0.476M increase as a result of Growing Forward 2.

MINISTRY OF AGRICULTURE
2013/14 PLANNED EXPENDITURES BY GROUP ACCOUNT CLASSIFICATION
Includes Operating, ALC and PISA



Note: Amounts do not reflect internal and external recoveries

Ministry of Agriculture
CORE BUSINESS ANALYSIS
(\$000s)

EXECUTIVE AND SUPPORT SERVICES	2012/13 Estimates	2012/13 Restated	2013/14 Estimates	2014/15 Planned	2015/16 Planned
Voted Appropriations					
Minister's Office	503	503	503	503	503
Corporate Services	6,318	6,290	6,248	6,248	6,248
Operating	6,821	6,793	6,751	6,751	6,751
Capital	290	290	355	593	568
<i>Operating Increase/(Decrease):</i>		(28)	(42)	-	-
<i>Percentage Changes:</i>		(0.4%)	(0.6%)	-	-
<i>Capital Increase/(Decrease):</i>		-	65	238	(25)
<i>Percentage Changes:</i>			22.4%	67.0%	(4.2%)

OPERATING BUDGETS:

2012/13 Restated Estimates: \$6.793M decreased (\$0.028M) or (0.4%) from 2012/13 Estimates:

- (\$0.003M) decrease due to the transfer of the Range Policy to FLNRO in the September 2012 re-organization.
- (\$0.025M) decrease due to the recent STOB realignment within the Ministry.

2013/14 Estimates: \$6.751M decreased (\$0.042M) or (0.6%) from Restated:

- (\$0.042M) decrease due to expenditure management savings target.

2014/15 Planned - no change

2015/16 Planned - no change

CAPITAL BUDGETS:

2012/13 Restated: no change

2013/14 Estimates: \$0.355M increased \$0.065M or 22.4% from 2012/13 Restated:

- \$0.065M increase for Emergency Lab Database.

2014/15 Planned: \$0.593M increased \$0.238M or 67.0% from 2013/14:

- \$0.353M increase for Vehicle Replacements.
- (\$0.115M) decrease for Emergency Lab Database.

2015/16 Planned: \$0.568M decreased (\$0.025M) or (4.2%) from 2014/15:

- (\$0.025M) decrease for Emergency Lab Database.

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EXECUTIVE AND SUPPORT SERVICES (Cont.)

EXECUTIVE AND SUPPORT SERVICES	2012/13	2012/13	2013/14	2014/15	2015/16
Budget Allocation	Estimates	Restated	Estimates	Planned	Planned
Minister's Office	503	503	503	503	503
Deputy Minister's Office	1,728	1,703	1,661	1,661	1,661
CSNR	2,940	2,940	2,940	2,940	2,940
Agriculture Overhead	1,650	1,647	1,647	1,647	1,647
	6,821	6,793	6,751	6,751	6,751
Capital Budget Allocation					
Specialized Equipment	-	212	212	212	212
Office Furniture & Equipment	3	3	3	3	3
Vehicles	-	-	-	353	353
Information Systems	-	75	140	25	-
	3	290	355	593	568

RECOVERIES IN 2013/14 ESTIMATES:
88 - Recoveries Within CRF

Miscellaneous

 Internal
(1)

External

89/90 - Recoveries Ext to Govt Rptng Entity

Miscellaneous

(3)

Total Recoveries

(1)

(3)

Ministry of Agriculture
CORE BUSINESS ANALYSIS
(\$000s)

	2012/13	2012/13	2013/14	2014/15	2015/16
AGRICULTURAL LAND COMMISSION	Estimates	Restated	Estimates	Planned	Planned
Voted Appropriation					
Agricultural Land Commission	1,974	1,974	2,905	3,516	3,391
<i>Increases/(Decreases):</i>		-	931	611	(125)
<i>Percentage Changes:</i>		-	47.2%	21.0%	(3.6%)

2012/13 Estimates - no change

2013/14 Estimates: \$2.905M increased \$0.931M or 47.2% from 2012/13 Restated:

- \$0.931M increase to support ALC's new fees and revenues structures.

2014/15 Planned: \$3.516M increased \$0.611M or 21.0% from 2013/14:

- \$0.611M increase to support ALC's new fees and revenues structures.

2015/16 Planned: \$3.391M decreased (\$0.125M) or (3.6%) from 2014/15:

- (\$0.125M) decrease to support ALC's new fees and revenue structures.

RECOVERIES IN 2012/13 ESTIMATES:

Internal External

88 - Recoveries Within CRF

Miscellaneous (1)

89/90 - Recoveries Ext to Govt Rptng Entity

Miscellaneous (3)

Total Recoveries (1) (3)

Ministry of Agriculture
CORE BUSINESS ANALYSIS
(\$000s)

	2012/13	2012/13	2013/14	2014/15	2015/16
PRODUCTION INSURANCE SPECIAL ACCOUNT	Estimates	Restated	Estimates	Planned	Planned
Statutory Appropriation					
Operating Budget	18,500	18,500	18,500	18,500	18,500
Transfer from Ministry Operations Vote	(7,000)	(7,000)	(8,800)	(8,800)	(8,800)
	11,500	11,500	9,700	9,700	9,700
<i>Increases/(Decreases):</i>			<i>(1,800)</i>	-	-
<i>Percentage Changes:</i>		-	<i>(15.7%)</i>	-	-

2012/13 Restated Estimates - no change

2013/14 Estimates: \$9.700M decreased (\$1.800M) or (15.7%) from 2012/13 Restated:

- (\$1.800M) reflects an increase for transfer payment toward PISA from the Ministry Operations Vote.

2014/15 Planned - no change

2015/16 Planned - no change

Program Description:

- This account was established as a special account effective April 1, 2005 by Section 9.2 of the *Special Accounts Appropriation and Control Act* and replaces the Crop Insurance Fund created by a regulation under the *Insurance for Crops Act*.
- Production Insurance is an insurance scheme that stabilizes farm income by minimizing the detrimental economic effects of crop losses due to uncontrollable natural perils. The account receives premiums from the federal government, the province, and producers, and indemnity payments through re-insurance.
- The funds transferred to the Special Account are estimated annual insurance premiums. BC's portion is approximately 33% of total premiums which range between \$24 - \$26M. This means the budgeted premium costs (transferred from the Ministry Operations Vote) are \$8.8M. Producers and the federal government pay the remainder of the premium costs.
- The operating budget reflects the average annual expenditures for re-insurance premiums, claim adjusting costs and indemnity payments.

Ministry of Agriculture

Estimates 2013/14



Planning Assumptions

- No workforce adjustment
- Negotiated salary increases absorbed by all divisions (3 year mandate, up to 2% per year)
- Staffing lag of 5%
- No new revenue sources identified
- Status quo CSNR charges

2013/14 Operating Budget

The combined 2013/14 budget is \$79.307 million

- This represents an increase of \$11.164 million or 16.4% from the previous year
- The change is due to:
 - \$6.5 million for the Greenhouse Carbon Tax Relief Program
 - \$4.039 million for the Meat Inspection Program transferred from the Ministry of Health
 - \$0.931 million budget lift for Agricultural Land Commission to support their new regulatory fees/revenues
 - (\$0.306) million for expenditure management savings target

2013/14 Capital Budget

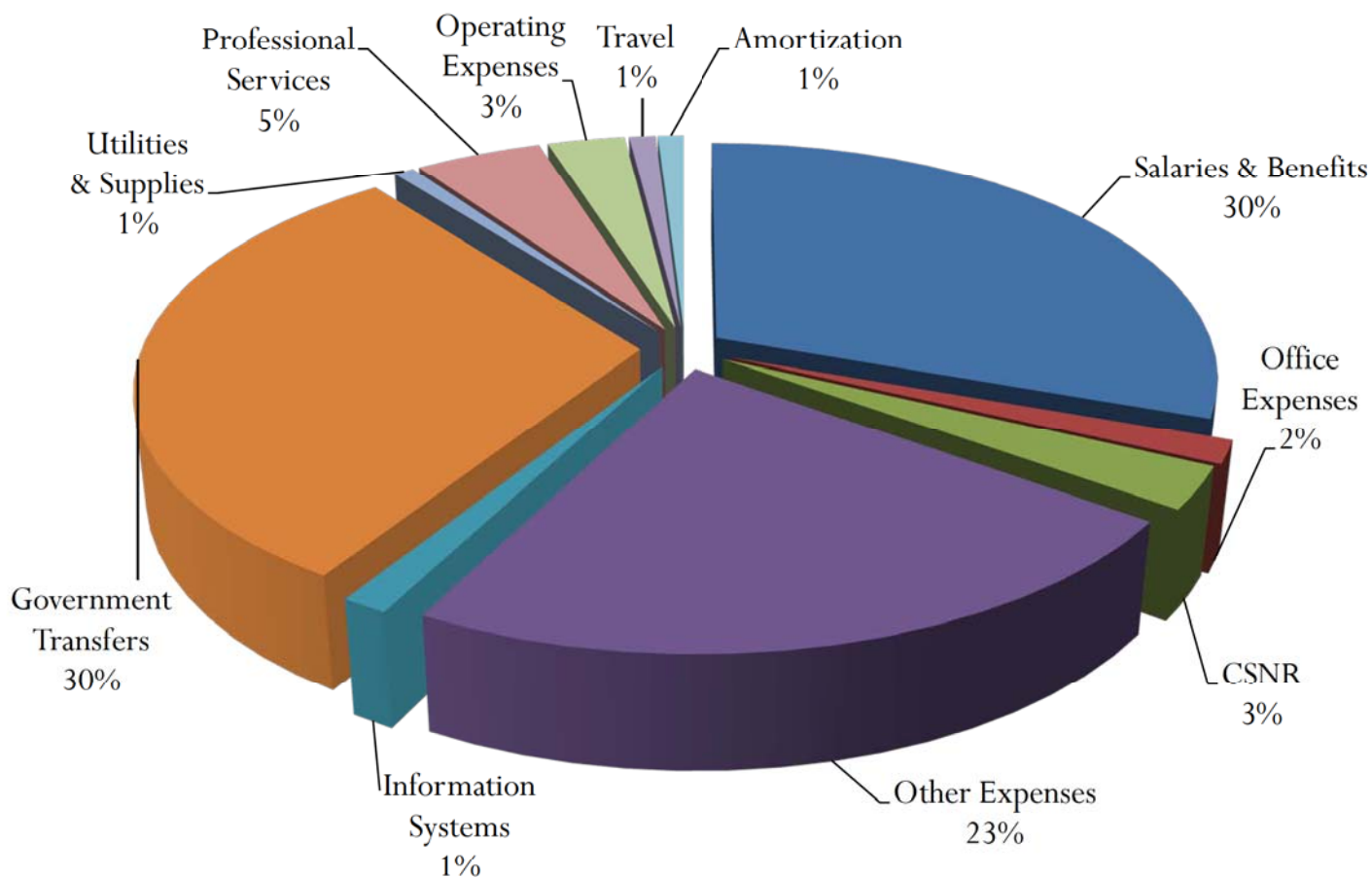
The combined 2013/14 budget is \$0.355 million

- This represents an increase of \$0.065 million or 22.4%
- The change is due to:
 - \$0.065 million increase in Information Systems (Emergency Lab Database)

Budget Allocations

(\$000s)	2012/13 Estimates	2012/13 Restated	2013/14 Estimates	2014/15 Estimates	2015/16 Estimates
Voted Appropriations					
Ministry	52,314	54,669	66,702	65,617	65,717
ALC	1,974	1,974	2,905	3,516	3,391
Statutory Authority					
PISA	18,500	18,500	18,500	18,500	18,500
PISA Elimination	(7,000)	(7,000)	(8,800)	(8,800)	(8,800)
	65,788	68,143	79,307	78,833	78,808
Capital					
Ministry	290	290	355	593	568

2013/14 Group of Account Allocation \$100.707M

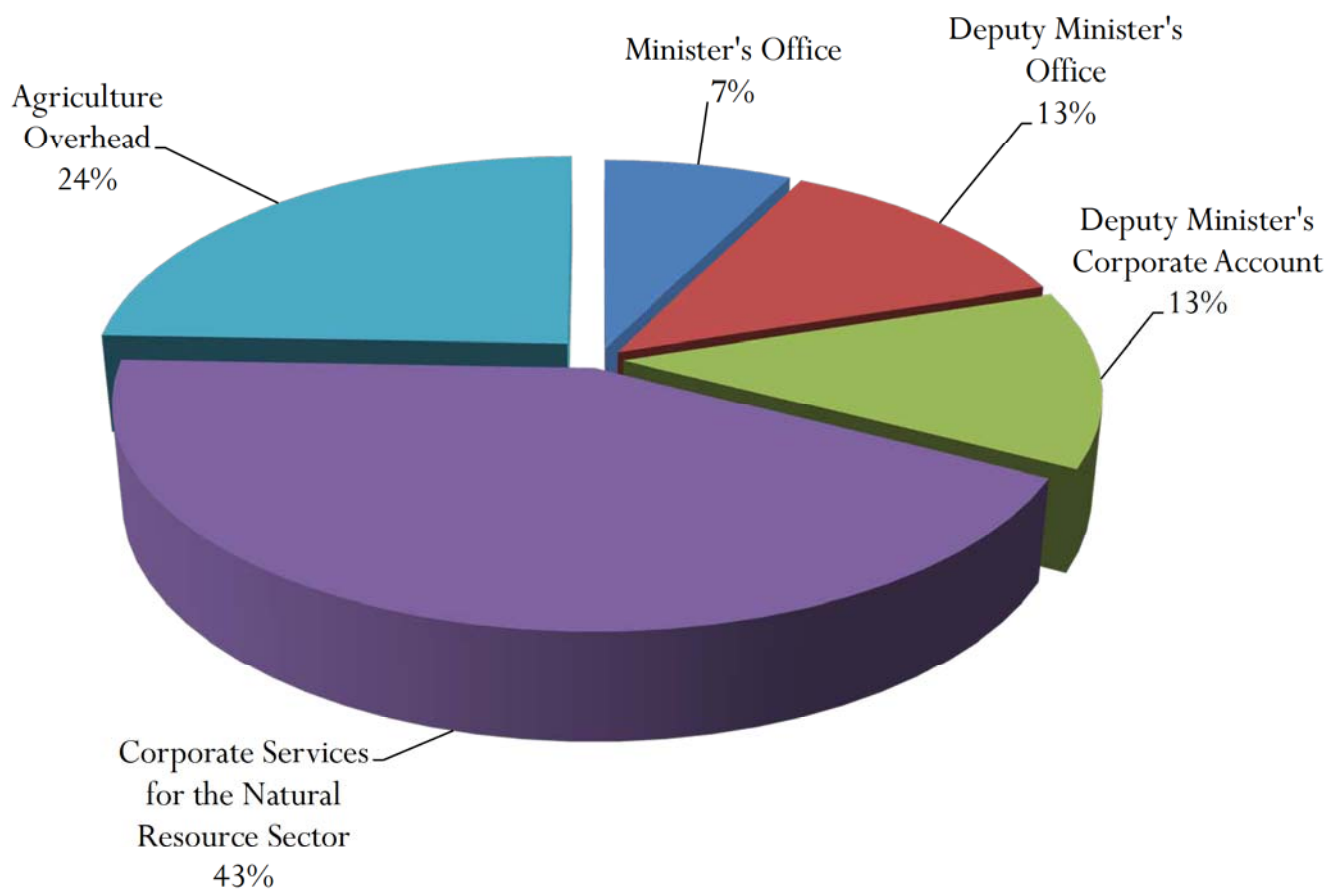


Note: The above do not reflect internal and external recoveries

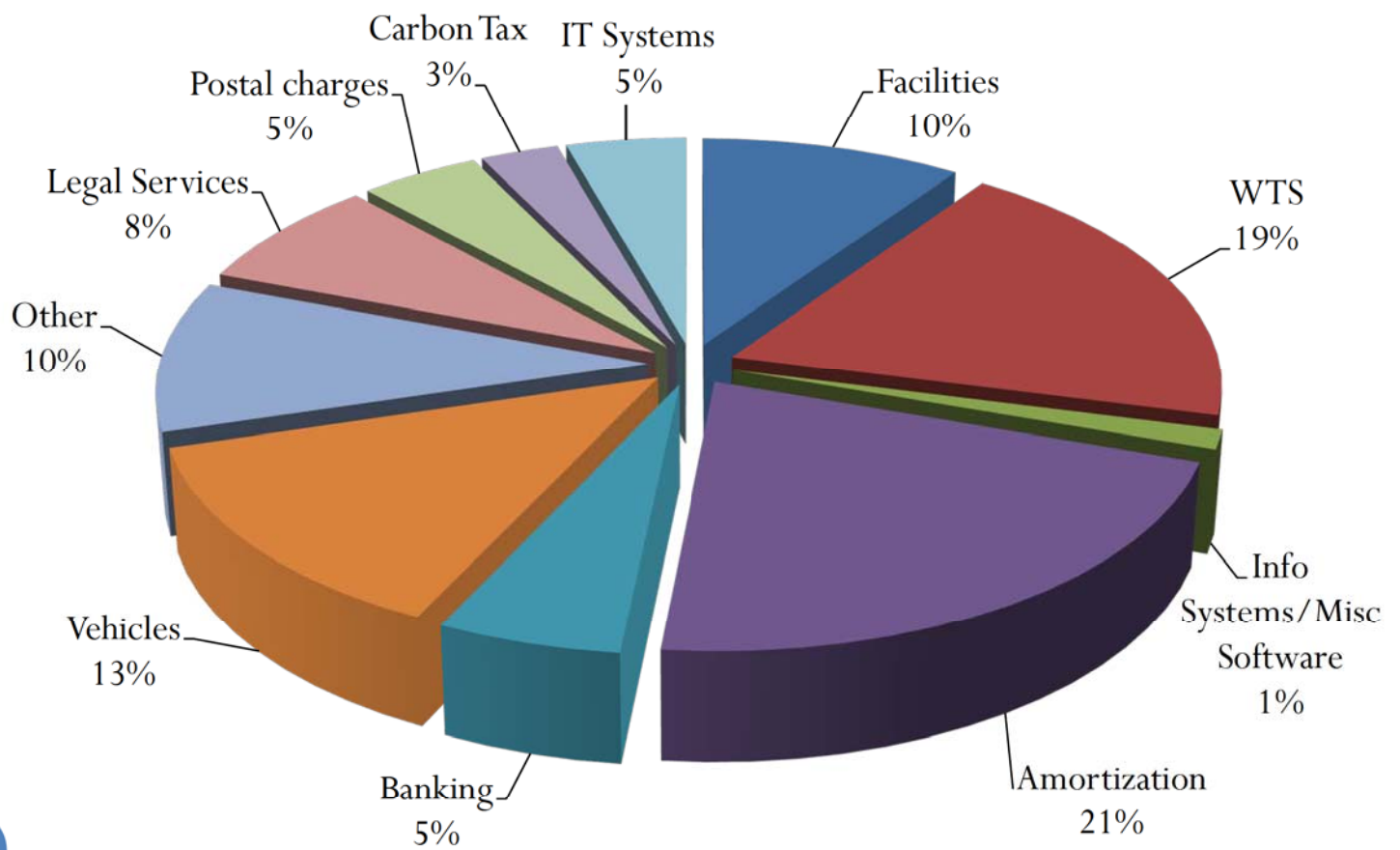
CSNR = Corporate Services for the Natural Resource Sector

Executive & Support Services

\$6.751M

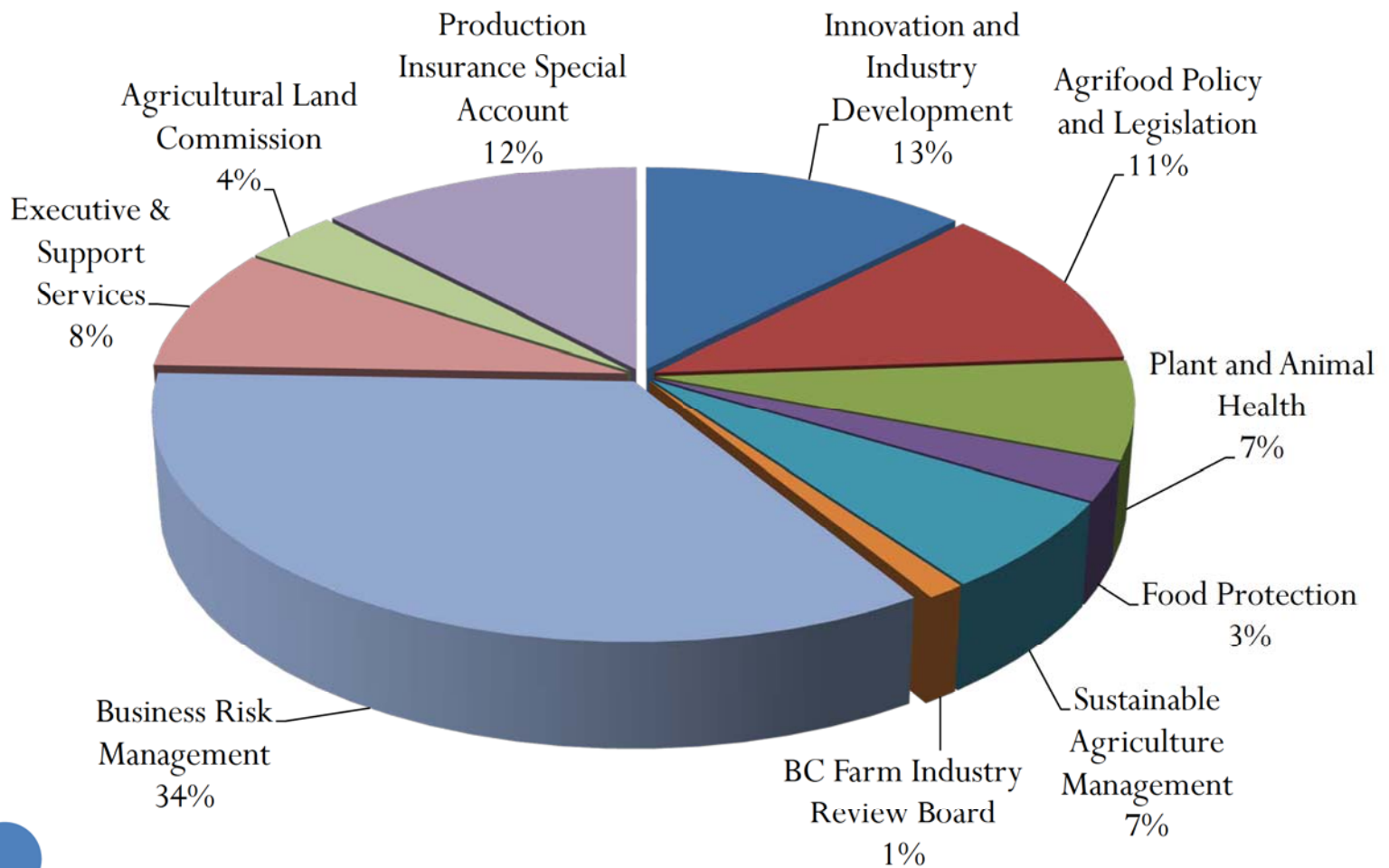


Agriculture Overhead \$2.137M



Planned Expenditures by Core Business

\$79.307M



Agriculture Science & Policy

Provides for surveillance, diagnostic services, and management systems including licensing and inspection to monitor and improve plant and animal health and for the creation and delivery of industry initiatives including research and innovation.

- Working Budget at 95% for staffing
- 2% negotiated increase to be absorbed
- Estimates Budget 2013/14 \$24.441M
- Known Pressures:
 - Projected retirements (22)
 - \$0.138M transferred from DMO for lab amortization
 - \$0.400M additional spending forecasted for Greenhouse Carbon Tax Relief Program

Strategic Industry Partnerships

Provides for provincial and federal-provincial agricultural risk management programs, insurance schemes, and funding of programs and trusts; business development; youth development; and promoting public awareness and support for agriculture and food sectors.

- Working Budget at 95% for staffing
- 2% negotiated increase to be absorbed
- Estimates Budget 2013/14 \$34.614M
- Known pressures:
 - Projected retirements (27)
 - Write-off: Fisheries Aqua Authorization Mgmt. System \$0.236M

BC Farm Industry Review Board

Is an independent administrative tribunal responsible for the supervision of the operation of the marketing board and commissions formed under the Natural Products Marketing (BC) Act; the hearing of appeals on regulated marketing issues; the hearing of complaints and conducting inquiries related to farm practices under the Farm Practices Protection (Right to Farm) Act; and the hearing of animal seizure appeals under the Prevention of Cruelty to Animals Act.

- Working Budget at 95% for staffing
- 2% negotiated increase to be absorbed
- Estimates Budget 2013/14 \$0.896M
- Known Pressures:
 - Work activities related to the Prevention of Cruelty to Animal Cruelty Act \$0.100M (currently forecasted through Deputy Minister's Office)

Agricultural Land Commission

Is responsible for preserving the scarce supply of agricultural land in the province through policies and programs that foster long-term sustainability and encourage farm businesses.

- Working Budget at 95% for staffing
- 2% negotiated increase to be absorbed
- Estimates Budget 2013/14 \$2.905M
- Known Pressures:
 - Projected retirements (6)

Production Insurance Special Account (Net)

Offers farmers financial protection against crop losses due to uncontrollable weather. The program's goal is to work with farmers to make production insurance more efficient and effective to strengthen British Columbia's valuable farming community, and to protect the food supply.

- Estimates Budget 2013/14 \$9.700M

Representative Groups/Associations

- BC Cattlemen's Association, www.cattlemen.bc.ca
- BC Association of Cattle Feeders, www.bcacf.com
- BC Association of Abattoirs, bcabattoirs.org
- BC Breeders and Feeders Association, www.bcbfa.ca
- Cattle Industry Development Council, www.cattlefund.net

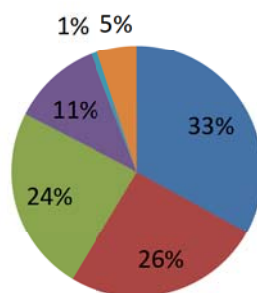
Industry Description

Production

- Cow-calf operations produce feeder calves. 85 per cent of BC's feeder calves are sold into Alberta for finishing.
- Backgrounding or feeder operations take calves and grow them, predominantly through a forage-based ration. There are approximately 635 operations, some of which are also cow calf.
- There are approximately 183 finishing operations in BC that bring the animals up to slaughter weight, serving 15 per cent of the feeder calf operations.
- Cull animals not used for dairy production go into the beef chain; they may be cows or younger animals.
- In 2011, there were a total of 5,790 farms with beef in BC. 2,579 were primarily beef cattle producers whereas the remainder produced beef in conjunction with other activities.

Distribution of Beef Cows and Heifers May 2011

■ Thompson-Okanagan ■ Cariboo ■ Peace River ■ Netchako ■ Kootenay ■ Lower Mainland-Vancouver Island



Slaughter

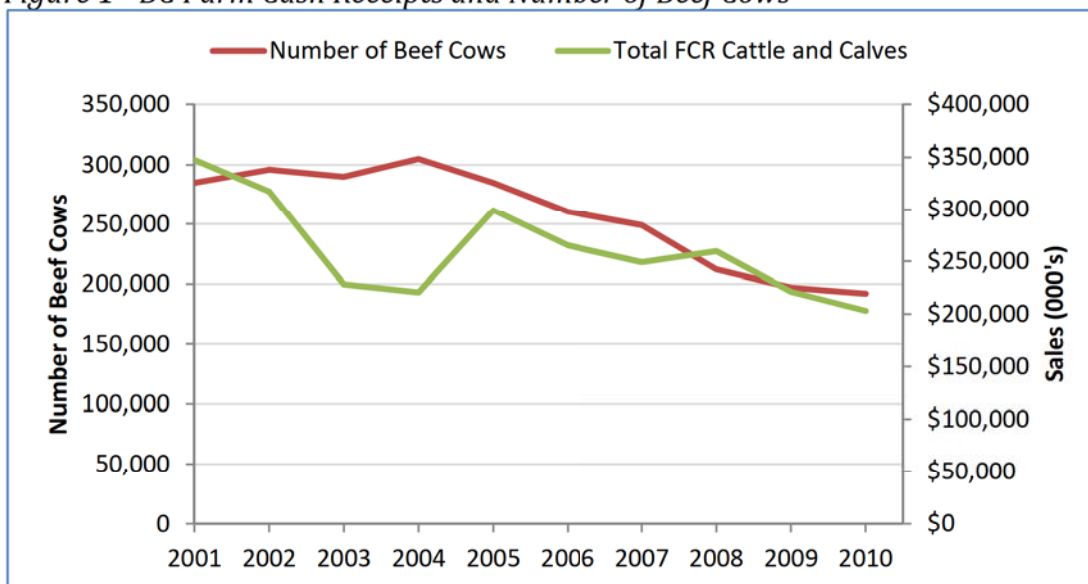
- There are currently 35 provincially licensed Class A and B facilities that slaughter and process cattle for consumption within the province. These facilities slaughtered 25,001 head in 2012.
- There are currently no federally licensed slaughter facilities in BC. There are two large federal slaughter plants in Alberta. There is also a large slaughter plant in Washington (Tri-cities area.)
- There are 6-8 federally licensed beef processors in BC which do not slaughter. These facilities

must source their beef from federally inspected facilities outside the province.

Statistics

- 2011 farm cash receipts from the sale of cattle and calves were almost \$194 million, which represented 8 per cent of BC's total farm cash receipts and 15 per cent of BC's livestock farm cash receipts.
- At the end of 2011, the livestock estimate showed:
 - 326,800 cattle on BC cow-calf operations, including 196,800 beef cows.
 - 76,900 cattle in feeding, feeder and stocker operations.
 - 74,200 dairy cows.
- The BC herd represents approximately 4.5 per cent of the Canadian cattle inventory and 0.6 per cent of the North American inventory.
- Calf and feeder cattle prices were significantly higher in 2011 than in the previous year

Figure 1 - BC Farm Cash Receipts and Number of Beef Cows



Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents

1 Industry Specialist (0.9 Beef and 0.1 Bison) in addition to other supporting policy analysts, agrologists and animal health staff.

Notable Program Funds

Agriflex: \$2 million (2010 - 2014)
Buy Local Program: over \$85,000

Business Risk Management
Funds (2010-2012)

Agristability: \$2 million
Wildlife Compensation Program: \$1.8 million
AgriInvest: \$1.2 million (2008 – 2011)

Strengths, Weaknesses, Opportunities and Threats

Strengths

- The ranching community has relatively strong equity.
- The Ranching Task Force Funding Initiative investment in industry provides the potential for long-term benefits to the industry (\$4.3 million federal-provincial initiative for research and market development which finishes March 2014).
- Active industry associations.
- The BC ranching sector has a favorable public image of green fields, clean air and water and habitat for domestic animals and wildlife.

Weaknesses

- Crown land issues:
 - Changes in forest practices have reduced the forage available on Crown land, changed ungulate grazing habits, and increased wildlife foraging on private land.
 - The ranching sector competes for the use of Crown land with recreation, forestry, mining and wildlife habitat.
- There has been increased predation, particularly from wolves.
- Poor profitability in the sector over the past 10 years has hindered new entrants to the business and the intergenerational transfer of existing business, resulting in a relatively aged ownership cohort. Increasing environmental restrictions and regulations increases the costs and complexity of operating a business.

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Opportunities

- Increasing demand for “local” foods, branded products.
- Increasing consumer confidence in BC beef through:
 - Enhanced provincial meat regulations and inspection to provide a higher level of food safety.
 - Improved traceability of meat products.
- Decrease in beef cow herd in other areas in North America means short to medium term opportunities for those still in business to take advantage of anticipated higher prices.

Threats

- North American price for beef is largely export driven, by demand in Asian markets. An economic slowdown in those markets could decrease demand for North American beef and

decrease prices.

- Food recalls such as the 2012 XL Foods meat recall have caused concern amongst consumers about the safety of meat and beef products.
- Consumer attitudes about meat production and consumption are shifting, especially in younger consumers.
 - Some animal agriculture practices are perceived to be cruel and unethical (castration, for example), leading to concerns about animal welfare.
 - Animal production is perceived as wasteful of scarce resources such as feed, fuel, and water.
 - Red meat consumption is perceived as being unhealthy, or less desirable than other forms of animal and vegetable protein.
- US Country of Origin Labeling laws continue to disadvantage beef produced in Canada relative to beef produced in the US. Recent proposals by the US in response to trade challenges are even more problematic than the laws currently in place.
- US energy policy mandates the production of corn based ethanol which results in high grain prices, and has been exacerbated by the recent drought, which further decreased corn availability. This disadvantages the livestock industry.

Markets

- BC exported \$47.2 million worth of live cattle and live bison in 2012, an 11.7 per cent increase from 2011. The majority of BC's international live cattle exports are shipped to the United States (US).
- While BC cannot export beef directly to international markets due to a lack of federally-certified processing facilities, some BC beef is shipped internationally after being processed in Alberta and the US.

Areas of focus for 2013

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- Industry is doing consumer outreach and public education about beef and the ranching sector. They are continuing to monitor government initiatives with regards to waste management and water resource use.

Representative Groups/Associations

- BC Honey Producers Association, www.bcbeekeepers.com
- BC Bee Breeders Association, www.bcbeekeepers.com
- Canadian Honey Council, www.honeycouncil.ca

Industry Description

- There are over 2,000 registered beekeepers in BC that operate approximately 45,000 honey bee colonies.
- The majority of beekeepers are hobbyists that operate less than 10 colonies.
- Honey bee colonies are managed in all agricultural areas of the province with the highest concentrations in the Fraser Valley, Okanagan and Vancouver Island.
- Honey bees are critically important to meet the crop pollination requirements of most fruit crops in the province, however, the majority of beekeepers don't prepare and rent their colonies for crop pollination contracts because
 - they may not have enough colonies to make it worth their while,
 - their colonies may not be strong enough for early crops (for example, blueberry is the first crop in the season when weather conditions are often poor),
 - most beekeepers focus on honey production and pollination contracts tend to be more suitable to the larger beekeeping operations, and
 - many smaller beekeepers feel that their bees suffer when placed in pollination contract situations when density is high and colonies of different operations are nearby, resulting in increased disease incidence.
- Recent media reports have focused on a honey bee shortage impacting pollination and in turn threatening the BC blueberry crop. While it is true that growth in blueberry acreage has increased demand for honey bees, and that some growers have struggled to get enough bees for their fields, the threat has been over-stated and crop prospects continue to look favourable.

Statistics

- Production levels have remained stable this year and potentially improved as more beekeepers have successfully wintered larger numbers of colonies.
- 2012 honey sales totaled approximately \$8 million.
- Income from crop pollination contracts now exceeds \$3 million per year.
- The value of BC crops dependent on bee pollination exceeds \$200 million per year.
- Winter colony mortality has been as high as 30 per cent since 2007. In 2011/12, the colony mortality declined to 23 per cent and preliminary reports for this year indicate that colony losses have gone down further.

Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	1.0 Apiculture specialist 0.6 Apiculture Assistant 0.4 Apiary Inspectors
Notable program funds	Genome BC (Ministry of Health): (estimated) \$1.42 million between 2012-2014
Business Risk Management (2010-2012)	<i>Data is summarized within a larger category so the sector breakdown is currently unavailable.</i>

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Beekeepers have demonstrated their resilience in the face of many challenges over the past few years.

Weaknesses

- Aging producers and succession challenges.
- Relatively slow to adopt science-based management techniques.

Opportunities

- Demand for high-quality BC-produced foods, branded products.
- If producers of open-pollinated crops (in particular blueberry growers) followed recommended guidelines for pollinator colony density placement, there would be a greater demand for honeybee colonies in the province, especially as Alberta honey bee producers have recently chosen to stop overwintering their colonies in BC.

Threats

- Economic impact of bee diseases.
- Agricultural chemicals (notably, neonicotinoids) are a major concern for the industry.

Markets

- BC exported almost \$0.4 million in honey in 2012. The top markets were Japan and China.

Areas of focus for 2013

- Ongoing surveillance of diseases and pests with emphasis on the early detection of the Small Hive Beetle.

Representative Groups/Associations

- BC Blueberry Council, www.bcblueberry.com
- BC Raspberry Industry Development Council, bcraspberries.com
- BC Strawberry Growers Association, bcstrawberries.com
- BC Cranberry Marketing Commission, bccranberries.com
- BC Cranberry Growers Association, www.bccranberrygrowers.com

Industry Description

Blueberries

- The blueberry industry is based in the Fraser Valley and Lower Mainland. There are about 800 growers and 22,000 planted acres, of which an estimated 3,000 acres have not yet begun to bear fruit.
- Individual farm size ranges from one to over 1,000 acres. The largest 50 growers account for over half of the total volume. Many of the remaining growers are small, part-time growers producing on farms of 10 acres or less.
- Blueberries are produced for both the fresh and processing markets. The percentage of total fruit going to each market depends on the season and market conditions. There are 20 companies, mostly privately owned, who pack and/or process blueberries.
- The BC blueberry council collects levies on fruit produced in BC and works to develop the industry through promotion, research and grower education. A major challenge for the industry is the large number of new, inexperienced growers.
- The 2012 crop was a record 115 million pounds (lbs), an increase of approximately 20 million lbs from last year.
- In 2012, large volumes and quality issues caused the fresh market grower price to fall to \$1.20 per lb; well below that of 2011. As large volumes of fruit were diverted to the frozen market grower the price for frozen fruit dropped to \$0.90/lb, also well below 2011.
- In the longer term, with dramatic increases in planted acreage, world production is projected to double over the next five years.
- The industry is anticipating a difficult market in 2013 as a result of high frozen inventories and a positive crop outlook for all producing regions in North America.

Cranberries

- The cranberry industry is based in the Fraser Valley and Lower Mainland with some acreage on Vancouver Island. There are 80 growers with 6,539 acres in production. Most are affiliated with Ocean Spray and are relatively large, full-time growers.
- Most cranberries grown in BC are destined for the processing market.
- 2012 saw a rebound of BC cranberry production after very disappointing harvests in 2010 and 2011. The crop was a record harvest of 94 million lbs.
- Grower prices were in line with previous years at about \$0.60 per pound, which gave a

profitable return to growers.

- Prior to the 2012 harvest, Ocean Spray opened up a new, state-of-the-art receiving station in Richmond with a capacity of handling 6 million pounds of fruit per day. After some start up challenges, it was deemed a success in handling the large crop volume efficiently. The expanded capacity of the new facility will be critical in handling future acreage increase.

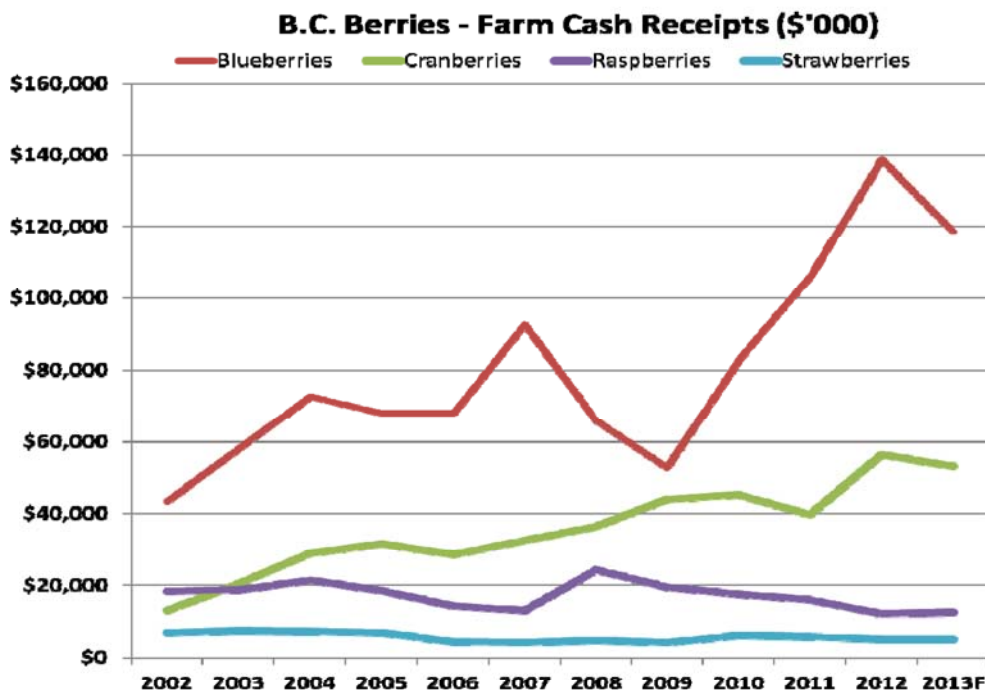
Raspberries

- The raspberry industry is based in the Fraser Valley, with the highest concentration of acreage on sandy soils south of Abbotsford. There are currently 130 growers with about 3,000 acres in production. Most of the production is destined for the processing market.
- The 2012 season was difficult for raspberry producers due to unfavourable weather. Total volume was 18 million lbs; one of the poorest crops in recent years.
- Growers continue to be plagued by a host of pest and disease challenges including root rot, viruses, weevils and Spotted Wing *Drosophila*, and market conditions continue to be discouraging. Large world production coupled with sluggish consumption will likely mean a grower price of less than \$0.60 per lb range for processing fruit with little optimism for significant improvement in the near future.
- With increased costs for fertilizer and pesticide inputs, higher labour costs and a host of production challenges, many growers are re-evaluating their future plans. More and more growers are removing raspberries and planting blueberries, a crop they believe will have future demand and be more cost-effective to produce.

Strawberries

- There are an estimated 75 strawberry growers in BC. With the demise of the processing industry, most have relatively small acreages of strawberries along with other fruit and vegetable crops. Most of the production is direct marketed through on-farm sales, U-picks, farmers markets and produce stores. Volume of sales is difficult to track but is estimated at \$6 million.
- Prior to the start of harvest, BC's largest strawberry processor announced that they would not be receiving any BC fruit in 2012. Instead they sourced their fruit from California, which is cheaper, more reliable and consistent in quality. Most growers had expected this, but several growers who had not adjusted their planted acreage were faced with no market for a significant volume of crop. As a result, more fruit was sold on the fresh market which had a negative impact on local prices.
- Modest growth in the local fresh market continues, but overall volumes will remain low relative to past years as growers are no longer producing for the processing market.

Statistics



Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents
Notable Program Funds

1.0 Berry Specialist
School Fruit & Vegetable Program: Government has provided over \$26 million since 2005.
Buy Local: \$15,700
AgriStability: \$4.6 million
Production Insurance: \$2.5 million
AgriInvest (2008-2011): \$2.2 million

Business Risk Management
funds (2010-2012)

Markets

- The top BC berry export in 2012 was blueberries at \$168 million, a 31 per cent increase from 2011. The top markets were the United States (US), Japan, China, Australia and New Zealand. Other berry exports included cranberries (\$40 million), raspberries (\$9 million), currants/gooseberries (\$0.2 million) and strawberries (\$0.2 million).
- Canada is currently in negotiations with China to open market access for fresh BC blueberries, which is expected to increase export opportunities for this sector moving forward.

- To support industry's international market development efforts, the ministry commissioned a study through an international market intelligence provider in 2012 that analyzed opportunities for fresh blueberries in China and Japan.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- All four berry groups have active strategic plans due for updating in the coming year.
- Berries are one of the fastest growing fresh and processed produce categories. This growth is strongly linked to many documented health benefits.
- BC's berry industry has a strong infrastructure of growing and packing and a developing value-added sector.
- BC's berry industry has relatively stable industry organizations which, with the exception of strawberries, have the capacity for adequate self-funding. A new blueberry organization, BC Blueberry Growers Association, was recently formed and is made up mainly of new entrants to the industry. Their leaders have expressed concerns about the high cost of production and inadequate support for local growers from the BC Blueberry Council and government.
- The sector has good international linkages and relationships which provide market intelligence and goodwill which has enhanced market stability and trade.

Weaknesses

- High input costs (e.g. pesticides and labour) and land costs relative to producers in the US, South America and Eastern Europe which impacts competitiveness.
- In blueberries, over half of the growers are new, inexperienced entrants.
- For raspberries and blueberries, there is a heavy reliance on undifferentiated, export commodity markets.
- The Fraser Valley Strawberry Growers Association previously accessed levy revenues from processed fruit through Vegetable Marketing Commission under the *Natural Products Marketing Act*. As a result of the demise of the processing sector they have no mechanism to reliably collect levies on fresh marketed fruit. They will be investigating the formation of a council in 2013.

Opportunities

- Novel product development could improve demand.
- Further research into health benefits of berries could result in stronger, more direct health messaging and promotion.
- Strengthened value chains. Much of the fresh and frozen fruit is sold as generic fruit through brokers with inadequate communication through the supply chain.
- Improved production efficiency could be achieved through research, technology transfer and extension.
- Improved quality and marketability through better genetics and production technology.

Threats

- There are concerns about the continued availability of a stable, efficient workforce.
- Urban-rural interface pressures can impact grower practices such as pesticide application and audible bird scare devices.
- Erosion of grower and packer returns when the Canadian dollar is at parity with the US dollar.
- The global recession has and could continue to soften demand for high-value products.
- The risk of food borne illness linked to domestic or off-shore fruit could greatly impact demand and consumption of berry products. Not all BC growers are Good Agricultural Practices Certified.
- There is an ongoing risk of supply surpassing demand, particularly with blueberries, leading to depressed pricing.
- Abnormal, variable weather patterns can have a huge impact on yields, quality and profitability.
- Aggressive new diseases, insects, weeds e.g. Spotted Wing *Drosophila*, Blueberry Scorch Virus increase cost of production and risk of crop loss.

Areas of focus for 2013

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- The blueberry and raspberry industries will continue to work on the formation of national councils and may need provincial support to help remove hurdles.
- In collaboration with federal government, support in developing new export markets. Of key importance is market access and promotion for BC blueberries in China.
- The blueberry industry would like continued support from the ministry under the *Farm Practices Protection Act* for socially-responsible use of audible bird scare devices.
- The cranberry industry has invested major resources towards the development of the Cranberry Research Farm and is in need of funding partners and guidance.
- All industries have an interest in maintaining programs that enable access to labour sources such as the Seasonal Agriculture Worker Program and Low Skills Program.
- All berry industries have a priority of maintaining access to cost-effective crop protection tools and will maintain activity in the pesticide minor use process.

Representative Groups/Associations

- BC Seafood Alliance, www.bcseafoodalliance.com
- Seafood Producers Association of BC, www.bcseafoodalliance.com
- United Fishermen and Allied Workers Union, www.cope378.ca/workplace/united-fishermen-and-allied-workers-union-caw
- CAWBC Association of Professional Fish Harvesters
- Individual harvest gear group organizations including; Deep Sea Trawlers Associations, Pacific Halibut Management Association, www.phmana.org, and Underwater Harvesters Association, www.geoduck.org
- Gulf Trollers Association, www.gulftrollers.com

Industry Description

- As fish become property when landed, the province is responsible for post harvest, or commerce of, marine fisheries. The federal government is responsible for the conservation and protection of fisheries.
- The commercial fisheries sector catches or takes in finfish, shellfish or other marine animals and plants from their natural environments. The sector does not include post-vessel processing or aquaculture harvests.
- Given the diversity of fisheries in BC, the fleet, like the resources, are distributed around the coast, often with home ports, in small coastal communities, although significant number are located in the lower mainland where the fish processing sector is concentrated.
- There is a wide range of ethnic diversity among BC fishermen, with over 20 per cent having emigrated from other countries, and 20 per cent from BC First Nations.
- Ownership of the fishing fleet varies widely; from single vessel owner-operators to large corporate-owned fleets.
- There are approximately 3,000 licensed commercial fishing vessels, with about 1,800 active. The fleet is diverse in terms of harvest species, gear used, vessel size and the scale of the fishing enterprise. Over the last few decades the fleets have been greatly reduced in numbers and the processing industry has consolidated. Fortunes in a number of fisheries have declined dramatically over the years, as both access to stocks and fish prices have eroded from levels seen in the 1980s. Some fleets have fared slightly better as many vessels have diversified and added several species harvest licences.
- Top commodities in terms of sales in BC in 2011 include: Pacific salmon, halibut, geoduck clams, prawns, crabs, tuna, sablefish, rockfish, and hake.
- Salmon, Hake, Halibut and Albacore Tuna are managed under international treaties.

First Nations

- BC First Nations have a long history and close ties with fisheries resources, and have a significant participation in commercial capture fisheries and processing. BC First Nations have food, social and ceremonial rights to fish, including salmon, as well as specific treaty allocations.

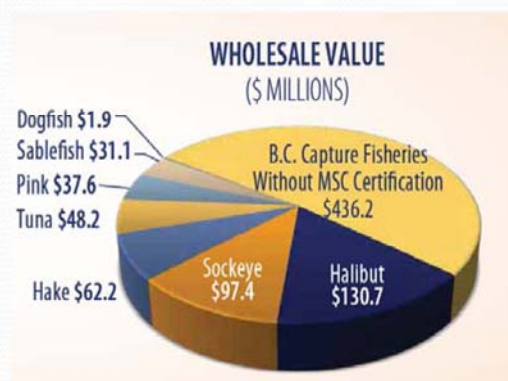
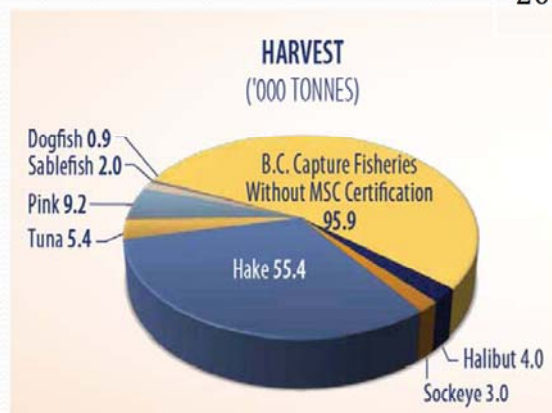
- First Nations treaty allocation will result in increased participation by First Nations in commercial fisheries.

Statistics

- Approximately 2,700 vessels harvested 168,800 tonnes of wild fish, shellfish and marine plants in 2011, a decrease of 3.4 per cent from 2010.
- A total of 5,766 individuals hold commercial fisheries licenses in BC, although employment is estimated to be approximately 1,400 jobs in 2011.
- In 2011, BC's commercial capture fisheries generated a landed value of \$345 million (up 4 per cent from 2010) representing 43 per cent of the total landed value of all BC seafood from more than 100 species.
- Landed values are highly dependent on the type and abundance of stocks which can vary significantly by species and year.
- In Canada, BC's commercial fisheries are ranked third in terms of volume and value of harvest. BC is ranked first among the provinces in the sale of wild salmon, halibut, and tuna.
- Total estimated gross domestic product (GDP) for commercial fisheries amounted to \$102 million.
- Both contribution to GDP and employment have declined significantly in recent years – 25 per cent and 66 per cent respectively.
- The Marine Stewardship Council (MSC) is the world-recognised leader in ecological certification. MSC certified fisheries have been assessed and certified as sustainable. The charts below shows MSC certified, sustainable fisheries by commodity and those without MSC Certification are grouped together.

Sustainable Fisheries in British Columbia

2011



Ministry Resources

Under Growing Forward 2, seafood associations and seafood processors, will be eligible for marketing funding, but fishers will not.

Full-Time Equivalent	1 Senior Manager, Fisheries and Seafood Policy, 1 Manager of Marine Fisheries, 1 Fisheries Mgmt Officer,
Notable Program Funds	Buy Local Program: \$131,000
Business Risk Management Funds	Not eligible

Strengths, Weaknesses, Opportunities and Threats

Strengths

- World leading precautionary management policies, fisheries monitoring systems and technology, to ensure sustainability.
- BC's groundfish fisheries are integrated and quota based and all bycatch is accounted for which has greatly reduced discards.
- The three main commercial fisheries for sockeye, pink salmon and chum have achieved Marine Stewardship Certification (MSC) ensuring critical access to markets. Other MSC certified fisheries included sablefish, halibut, albacore tuna, dogfish and hake.
- The sector has a strong focus on food safety, traceability and sustainability practices.
- Marketing programs and increasing quality control to improve product value.

Weaknesses

- Aging workforce and fleets.
- Marketplace competition from aquaculture which has become a global commodity.
- Increasingly variable returns making fishery management and effective marketing difficult.
- ^{s.13} Traceability of some product can be problematic.
- Most fisheries except Hake are low volume high value fisheries. The high value of the Canadian dollar against the United States (US) dollar makes it difficult to compete on the world market.

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Opportunities

- Increasing demand for "wild" and eco-certified fish is supporting prices in niche markets.
- Increasing sourcing of salmon from the Alaskan fishery by BC companies has sustained northern BC processing plants.

Threats

- Climate change may severely impact the habitat of wild fish species. For example, sockeye salmon are very susceptible to increased water temperatures during freshwater life stages.
- Changing oceanographic conditions is also varying the distribution and abundance of a number of species, particularly migratory ones – e.g. albacore tuna and Pacific hake.
- Managing stocks under the wild salmon policy, the precautionary approach, and under the *Species at Risk Act* may further constrain commercial fisheries as will the creation of Marine Protected Areas.
- Misinformation on stock status and product wholesomeness.

Markets

- Over 80 per cent of commercial fisheries production is destined for export markets.
- The top BC commercial fisheries export in 2012 was crabs at \$72 million, a 26 per cent increase from 2011. The top markets were China, the US and Hong Kong.
- Other top commercial fisheries products were hake (\$53 million), geoduck clams (\$43 million), shrimp and prawns (\$38 million), herring (\$34 million) and halibut (\$27 million). The combined export value of the five commercial salmon species was \$79 million.
- Participation in international tradeshow is very important for BC's seafood industry, as the majority of production is exported and a large proportion of sales are derived from these market development activities.
- BC seafood is served in approximately two billion meals annually in more than 70 different countries.

Areas of focus for 2013

- Represent Provincial interests at key international treaties including Pacific Salmon Treaty.
- s.13
- Support Canadian European Trade Agreement negotiators in pressing for tariff elimination for processed commercial fisheries products.

Representative Groups/Associations

- BC Dairy Association (BCDA), bcdairy.ca
- BC Milk Marketing Board (BCMMB), bcmilkmarketing.worldsecuresystems.com
- Dairy Industry Development Council, bcdairy.ca/dairyfarmers/articles/bc-dairy-industry//bc_dairy_industry

Industry Description

Industry overview

- In 2012, there were 514 licensed milk producers. 16 of these were certified organic and produced 3 per cent of milk. There were 34 licensed dairy plants. BC's organic milk sector continues to experience steady growth.
- BC's current average herd size is approximately 138 cows. The number of herds in the 200 to 500 cow range has increased over the past ten years.
- BC ranks first in Canada for the highest provincial herd average milk production and the highest milk quality according to annual national summaries and milk quality statistics.
- BC is third in Canada behind Ontario and Quebec in total milk production supplying 8% of the Canadian market.
- 69 per cent of producers and 74 per cent of BC's milk comes from the Fraser Valley. The Okanagan-Shuswap and Vancouver Island regions produce 15 per cent and eight per cent respectively.
- The BC Dairy Association is active and effective in lobbying, issues management and leadership and promotion for the industry.

Supply Management

- The BCMMB is a regulatory body which receives its authority under a number of provincial acts and regulations. BC's milk production is sold as part of the Western Milk Pool, which includes Alberta, Saskatchewan, Manitoba, and BC. The P10 Pool includes all ten provinces.
- Milk prices are based on consumer price and cost of production indices under the WMP and P10 Pool Agreements, revenues are shared through a monthly reconciliation so that all producers receive the same value for their milk.
- Quota in BC is expensive and in short supply. BC's quota prices have been and continue to be the highest among all provinces, exceeding \$42,000 per kg.

Food Safety

- As of February 1, 2013, it became mandatory that every licensed dairy be certified under the Canadian Quality Milk On-Farm Food Safety Program that was developed by the Dairy Federation of Canada and approved by the Canadian Food Inspection Agency (CFIA).
- Under the *Milk Industry Act* of BC, farm inspections are routinely conducted to ensure dairies operate in an environment that promotes clean milk production and safe handling practices. BC Ministry of Agriculture oversees farm inspections, raw milk handling, and milk

testing.

Statistics

- Farm cash receipts (FCR) were \$522.8 million in 2011. The FCR from dairy alone accounts for 20 per cent of the province's total farm cash receipts and dairy receipts represent the largest FCR value of any of BC's agricultural commodities.
- An independent report found that the BC dairy industry value chain generates approximately \$2.2 billion in economic output. About 7,000 jobs are supported directly by dairy producers and processors, with a further 6,240 jobs in related industries.
- Average producer revenues for 2011/2012 were 6.8 per cent higher than the previous year.
- During the 2011/2012 dairy-year, a total of 692 million litres of milk were produced in BC, an increase of 26 million litres or 4 per cent over the previous year's (2010/2011) production.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalent's	0.85 Dairy Industry Specialist, 1 Dairy Farm Inspector plus additional support across the ministry e.g. agrologists, veterinary and business risk management staff.
Notable Program Funds	School Fruit and Vegetable Program: \$1 million (Introduction of milk in 2013) Growing Forward 1: <ul style="list-style-type: none"> • Environmental Farm Plan and Best Management Practices Programs \$15.4 million. • AgriInnovation Program: \$7,000
Business Risk Management funds (2010-2012)	Agristability: \$700 Wildlife Compensation: \$282,000 AgriInvest: (2008 – 2011) \$79,000

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Supply managed commodity with stable prices and revenue streams.
- Very strong, well-developed and integrated service and support sector infrastructure.
- Strong national (i.e., Dairy Farmers' of Canada, Canadian Dairy Council) and provincial (i.e., BCMMB, BCDA) organizations.
- Sound governance, experience and planning on the Boards of BCMMB and BCDA.
- Stability in dairy processing capacity, particularly through three major dairy processors that

- handle greater than 90 per cent of BC's milk production.
- Close proximity to a world-class dairy research facility; University of BC's Dairy Education and Research Centre in Agassiz.

Weaknesses

- Industry is vulnerable to further quota cuts as a result of an increasing volume of cross border milk shopping. Current estimates reveal a loss of 8 per cent BC's total production; or the milk produced by 5,000 dairy cows over a year.
- Quota is in short a supply and is expensive which deters new entrants and expansion plans. Of the 11 quota exchanges held by BCMMB in 2012, there were an average of three sellers to

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- The industry is highly dependent on imported feed grains by railcar.

Opportunities

- The DFC have developed a proposed program called 'proAction Initiative' that is intended to take a more coordinated approach when designing, developing policy and implementing programs of importance to the dairy industry.
- The Strategic Milk Alliance, which includes the dairy industries of Alberta, Saskatchewan, Manitoba, BC, and DFC has an annual budget of \$15 million for three years to implement a marketing campaign to increase fluid milk sales in English-speaking Canada.
- BC has maintained a prominent position at the table of P10 negotiations that began two years ago to increase flexibility to support market growth and ensure adequate milk supply.
- Continued access to funding under BC's Environmental Farm Plan Program to facilitate adoption of innovative new technologies to improve waste and nutrient management.
- Potential for market development and growth of the organic dairy sector.
- Close proximity to a large population base with diverse ethnic communities provides new, value-added product market opportunities to small and large dairy processors.

Threats

- Erosion of market share through increases in cross-border shopping.
- A sudden rise in interest rates by 2 to 3 percentage points would cause a significant cash flow problem for many dairies who are operating with high operating lines of credit at very low interest rates, even though many may have moderate to high net worth.
- The Canadian dairy industry is concerned that dairy tariffs on imported dairy products may become part of the Trans-Pacific Partnership (TPP) negotiations.

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- Unless changes are made, the proposed amendments to the BC Agricultural Waste Control Regulation (AWCR) are perceived as a serious threat to dairy farm operations.

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- There is an ongoing risk of a major freshet. This could cause large scale flooding and disruptions in milk production and transportation.

Markets

- BC exported \$28.5 million in dairy products in 2012, a 19.7 per cent increase from 2011.
- About 52 per cent of milk production is utilized for fluid milk sales, and 48 per cent is allocated to non-fluid industrial dairy product sales.
- The top export markets were the U.S., Brazil, Egypt and Australia. Dairy product exports include natural milk constituents, cheese, butter, buttermilk, milk and cream.

Areas of focus for 2013

Ministry

- Continued involvement in discussions pertaining to the AWCR.
- Significant presence at current and upcoming P10 Pool negotiations.
- Continued collaboration between the Ministry and producers to ensure that every dairy farm has a premises identification.

Industry

- Development and implementation of marketing and promotion campaigns to address the lost fluid milk sales in BC to cross-border shopping.
- Request for federal and provincial governments to maintain strong support of supply management and import dairy tariffs at TPP negotiations.
- Expansion of BC's school milk program to make milk available to every child from Kindergarten to Grade 2.
- Implementation of controls to manage total BC milk production to avert significant over-quota monetary penalties.

Not Including Potatoes

Representative Groups/Associations

- BC Potato and Vegetable Growers Association
- Fraser Valley Cole Crop Growers Association
- Fraser Valley Bush Bean, Pea and Corn Growers Association
- Processing Vegetable Industry Development Advisory Committee
- BC Vegetable Marketing Commission (regulatory), www.bcveg.com
- BC Fresh Incorporated (Licensed Marketing Agency), www.BCfreshVegetables.com
- BC Produce Marketing Association, www.bcpma.com

Industry Description

Overview

- BC farmers produce at least 25 different field vegetables including cucurbits (e.g. squashes), root crops, brassicae crops (e.g. cabbages), alliums (e.g. onions), leafy vegetables and legumes.
- Over 75 per cent of production is located in the Lower Mainland, with an estimated 10 per cent on Vancouver Island, 12 per cent in Interior BC, and 3 per cent in northern regions. Operations range in size from a few acres to several hundred.
- Since 2001, the total growth in field vegetables has declined by about 15 per cent, with a corresponding reduction in total farm gate value.
- Key causes of the decline in BC production are competition with economies of scale (particularly with the United States (US)) and an increase in input costs (e.g. fuel, labour and land). Additionally, the decline can be attributed to increased competition for land with other more profitable forms of agriculture (i.e. greenhouse and berries). During the past decade, the growth in berries has coincided somewhat with the decline in annual field vegetables. Other important factors include fairly recent losses of agricultural land to industrial development in both Delta and farther east in the lower Fraser Valley; and the loss of a major processor of field vegetables.

Regulated and non-regulated vegetables

- Regulated vegetables include processing broccoli, cauliflower and Brussels sprouts, peas and beans. These crops are grown under contract with agreements in place with BC processors. Other storage crops, such as rutabagas, carrots, cabbage and beets also fall under regulation through the BC Vegetable Marketing Commission (BCVMC). Quota is required to grow these high volume storage crops and is allocated based on the five year average of growers and also on additional annual demand in the marketplace.
- Unless the grower has been exempted, regulated crops are marketed through a designated agency of the BCVMC (e.g. BC Fresh Inc. and Vancouver Island Produce).
- Regulated field vegetables are mainly marketed through relatively large retail outlets.

Not Including Potatoes

- Fresh market vegetables including sweet corn, cole crops (e.g. Brussels sprouts), cucurbits and leafy vegetables are unregulated, with the exception of lettuce on Vancouver Island. Fresh produce is marketed directly to the consumer at farmer's markets and farm stands, or to larger retail outlets either direct or through wholesalers and distributors.

Statistics

- BC produces over 75,000 tons of field vegetables (value exceeding \$50 million) annually.
- The value of storage vegetables for 2011/2012 (including beets, cabbage, carrots, yellow onions, parsnips, rutabagas and turnips) was \$10 million.
- 11,505 tons of processing crops (including peas, beans, cole crops) were produced in the 2011/2012 production year at a value of \$6 million.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	0.25 Field Industry Specialist
Notable program funds	Buy Local: \$16,000
Business Risk Management funds (2010-2012)	Production Insurance: \$1.4 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- The Processing Vegetable Industry Development fund was established as a result of the termination of the Income Assurance program for the processing vegetable growers. The fund is administered by the BCVMC and funds processing field vegetable sector projects at a 1:1 industry:fund ratio.
- The BCVMC regulate high volume storage crops and processing crops in BC under the *Natural Products Marketing Act* through a range of activities including licensing, allocation of production expansion and delivery of quota, and implementing production programs such as on-farm food safety and monitoring grade standards and performance.
- The regulated portion of the sector is represented through grower associations (Fraser Valley Cole Crop Growers Association, Fraser Valley Bush Bean, Pea and Corn Growers Association). Storage crop growers tend to be affiliated with other sectors (mostly berries or potatoes).
- Food safety is being addressed in a coordinated manner by the regulated field vegetable sectors. While its' uptake by the unregulated portion of the sector is dictated mainly by the markets, the pressure is increasing for all BC growers to adopt recognized on-farm food

safety programs. Increased recognition of the Good Agricultural Practices program by buyers is viewed positively by the sector as a sign that the marketplace is moving away from audit programs.

Weaknesses

- The BC vegetable sector could engage more with Canadian Horticulture Council in order to be adequately represented and to benefit from national programs.
- The vegetable processing sector in BC is increasingly vulnerable due to decreasing processing options over the past 15 years. In January 2008, one of two main processors in BC decided to no longer take vegetables impacting peas, beans, corn and cole crops.
- Lack of organization of small volume vegetable crops presents a huge challenge in developing a coordinated strategy to make improvements in areas such as innovation, marketing, food safety, crisis management etc.
- Although increasing interest in farmers' markets has been beneficial, this form of marketing is labour intensive and has limited appeal or value to the large volume producer.
- There are also challenges to increasing production capacity in the BC vegetable sector due to lack of new entrants into farming, increasing input costs and limitation of available land for new production.

Opportunities

- The BC Vegetable Sector Value Chain Roundtable was initiated in October 2010. The roundtable was initiated by the BCVMC and is assisted by Ministry of Agriculture (ministry) staff. An opportunities assessment identified market opportunities including local food, improved quality of BC vegetables, new production techniques, and ethnic products.
- Evolving food procurement policies in public sector institutions and forecasted population growth near major markets are opportunities for growth. New growth in the regulated vegetable sector is limited due to the regulatory structure; however, this structure provides stability that facilitates healthy growth in supply to match changes in demand.
- Demand for local product is a positive development in that its' seasonality has always put it at a competitive disadvantage to year-round imported product. There is an opportunity to increase production capacity to meet the growth in demand.
- Asian vegetables is a fiercely competitive sector, supplying growing ethnic markets.

Threats

- Consolidation in the produce retail sector results in demand from suppliers for increased volume of product. When combined with the competitive pricing environment, availability of local product at the retail level is a challenge. BC vegetable producers have difficulty satisfying the requirements of retailers due to lack of production capacity and relatively higher costs of production compared to the competition.

Not Including Potatoes

- Decisions by Health Canada to de-regulate pesticide products including *diazinon* and *linuron* are serious issues for vegetable growers. So far, there are no registered alternatives and it is uncertain whether the two active ingredients (new products) being worked on for

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Markets

- BC exported \$17 million in field vegetables in 2012, a 30 per cent decrease from 2011. The top markets were the US, China and Japan.
- Top field vegetable exports included potatoes (\$8 million), beans (\$3 million), chickpeas (\$2 million), lettuce (\$1 million) and eggplant (\$1 million).

Areas of focus for 2013

- The British Columbia Vegetable Sector Value Chain Roundtable will be pursuing the market opportunities identified through the opportunities assessment project.
- Industry will focus on advocating for food procurement policies in public sector institutions and increasing production and processing.

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Representative Groups/Associations

- BC Salmon Farmers Association, www.salmonfarmers.org
- Aboriginal Aquaculture Association, www.aboriginalaquaculture.com

Industry Description

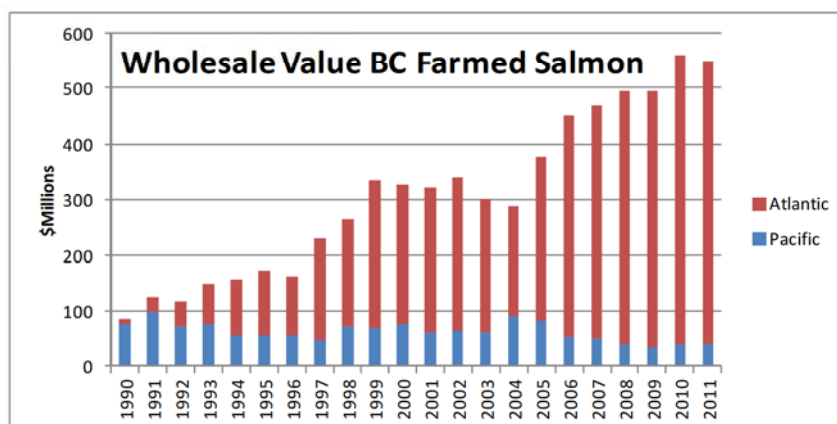
- 94 per cent of finfish aquaculture production is Atlantic salmon farmed in marine net pens. Chinook and sablefish are also grown in seawater whereas coho, sockeye, trout, sturgeon and tilapia are grown in freshwater systems.
- BC's salmon farming companies are vertically integrated as they own the hatcheries, grow-out facilities and some processing plants. There are a total of seven companies, three of which are multinational.
- A typical farm site produces between 2,500 and 3,000 tonnes per 2 yr cycle.
- Currently there are 124 salmon tenures of which 80-90 are in operation at any one time.
- The typical area of a salmon farm lease is 36 hectares (ha), which gives an estimated total lease allocation of 4,491 ha for salmon production on farms, or 0.1 per cent of coastal BC within one km of the shore.

First Nations

- First Nations are deeply divided on their support of salmon aquaculture.
- Several First Nations (e.g. Kitasoo and Ahousaht) have partnership agreements with the main aquaculture companies.
- Other First Nations, including several in the Broughton Archipelago (members of the Musgamagw Tsawataineuk Tribal Council), are publically opposed to salmon farming. One First Nation filed a class action law suit against the BC Government to address alleged impacts of salmon farms on wild salmon in their territory.
- The Namgis are currently developing a closed containment project near Port Hardy.

Statistics

- In 2011, the landed value of farmed salmon was \$435 million; 54 per cent of the total landed value of all BC seafood products. Cultured Atlantic salmon is BC's number one agricultural export in terms of value.
- Emerging species including trout, sablefish, sturgeon (including sturgeon roe) and tilapia had a wholesale value of approximately \$12 million in 2011.
- Direct employment in the salmon farming sector is around 2,800 Full Time Equivalents (FTE), mostly in rural coastal communities, with many jobs being held by women and First Nations.



Ministry Resources

Under Growing Forward 2, seafood associations and seafood processors will be eligible for marketing funds.

FTE's	0.5 FTE Industry Specialist, Aquaculture & Seafood
Notable Program Funds	Buy Local Program: \$7,500
Business Risk Management Funds	Not eligible

Markets

- The top BC finfish aquaculture export in 2012 was cultured Atlantic salmon at \$291.1 million. The top markets were the US, Japan, China and Taiwan.
- BC also exported \$11.2 million in cultured chinook salmon, \$1.1 in cultured coho salmon and \$0.6 million in cultured trout in 2012.
- Participation in international tradeshow is very important for BC's seafood industry, as the majority of production is exported and a large proportion of sales are derived from these market development activities. BC seafood is served in approximately two billion meals annually in more than 70 different countries.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Excellent growing conditions, clean water and environment.
- Proximity to the United States and Asian markets which have a strong market demand for finfish products.
- Salmon producers are vertically integrated with globally distributed production centres.
- The industry has access to strong, well developed research and development resources locally.

Weaknesses

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- Production cost is very high in BC relative to other regions/countries as a result of higher labour, material and regulatory costs.
- The industry has suffered from a lack of growth, as a result of little capital investment and corporate support.

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- The sector has a high media profile fuelled by a highly vocal environmental lobby.

Opportunities

- Increased access to sites in the North Coast and land-based farms offer growth potential.
- Crown Land tenures with longer durations and more favorable terms would improve business certainty and increase investment.
- Encouraging First Nations development opportunities will improve social license.
- Expanding domestic and Asian markets offers growth potential.

Threats

- Growing investment deficit relative to other regions, in particular Newfoundland, Chile.
- Global economic situation and increasing world supply.
- Potential for environmental, disease and product quality issues.
- Reliable and sustainable supply of marine-source fish meal/protein and changes in feed costs.
- Aboriginal land question and environmental lobby.

Markets

- The top B.C. finfish aquaculture export in 2012 was cultured Atlantic salmon at \$291.1 million. The top markets were the U.S., Japan, China and Taiwan.
- B.C. also exported \$11.2 million in cultured chinook salmon, \$1.1 in cultured coho salmon and \$0.6 million in cultured trout in 2012.
- Participation in international tradeshow is very important for B.C.'s seafood industry, as the majority of production is exported and a large proportion of sales are derived from these market development activities. BC seafood is served in approximately two billion meals annually in more than 70 different countries.

Areas of focus for 2013

- Represent Provincial interests at the Federal level to address regulatory uncertainties.
- Work with other Ministries to address crown land issues.
- Support initiatives that address local production cost to increase competitiveness.
- Support research and innovation commercialization funding initiatives, including closed-containment pilots.

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Ministry of Agriculture Fact Sheet

FINFISH AQUACULTURE

Representative Groups/Associations

- BC Grain Producers Association, www.bcgrain.com
- BC Peace River Grain Industry Development Council, www.bcpeace.com/GIDC
- National groups include: Grain Council of Canada, Canadian Grain Commission, Canola Council of Canada, Grain Growers of Canada and Canola Growers of Canada.

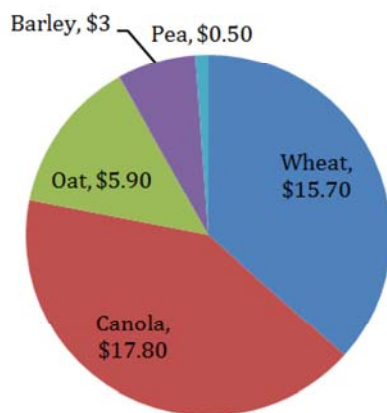
Industry Description

- There are 1,000 BC producers in this sector, 250 of which are in the BC Peace region and account for over 80 per cent of the farmed area and production for export.
- 327,000 acres are under cultivation in annual crop rotation in BC. 80 per cent of this area is in the Peace region. The remaining land is distributed in the Nechako, Cariboo and Kootenay Regional Districts.
- The area allocated to BC's main crops are as follows: Canola 29 per cent, Wheat 23 per cent, Barley 20 per cent, Oats 25 per cent, and Peas 3 per cent.
 - In the Peace region, these crops are produced on a large scale for export.
 - The Nechako, Cariboo and Kootenay regions use many of these crops, particularly barley and oats for local uses such as livestock feed; very little is harvested as grain and shipped for export.
- The majority of corn grown in BC is used for livestock forage rather than seed crop.

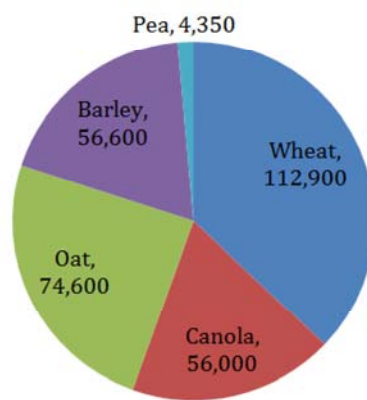
Statistics

- Just over 300,000 tonnes of grains and oilseeds were produced by BC farmers in 2011, generating farm cash receipts of close to \$43 million. This is broken down as follows:

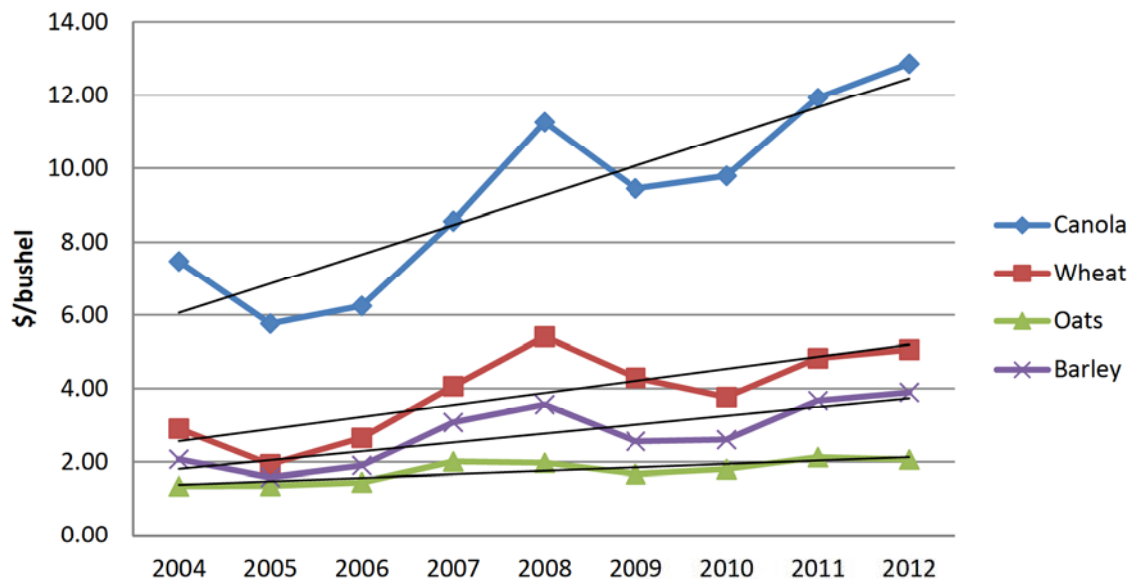
Crops by Farm Gate Sales (millions)



Crops by Volume (tonnes)



Crop Prices 2004-2012



Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents	0.5 Grains and Oilseed Industry Specialist, plus additional Agrologist and legislative support
Notable program funds	<i>This sector was eligible for programs that were open to all sectors through Growing Forward, such as the Canada-BC Agri-Innovation program, and the provincial Buy Local program.</i>
Business Risk Management funds (2010-2012)	Agristability: \$0.8 million Production Insurance: (federal & provincial) \$13.6 million Wildlife Compensation: \$100,000 AgriInvest \$1.2 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BC Grain Producers Association
 - An active producer group involved in regional, provincial and national issues, with a great understanding and relations with Government.
 - Research program has been running for over 15 years, doing variety trials, new crop development and agronomy work in the region and in cooperation with Agriculture and Agri-Food Canada.
- Commodity prices have been on an upward trend and 2013 input costs are average. The large scale drought across the United States (US) has driven 2012 prices to all-time highs.
- Production strengths for BC Peace growers:
 - Oil content in canola is consistently higher than other regions.
 - Large affordable land base.
 - Absence of many common diseases and pests, relative to other regions.
- BC Peace River Grain Development Council
 - Collects local levy and administers Peace River Agriculture Development Fund for projects and initiatives that benefit the whole industry.

Weaknesses

- Limited infrastructure prevents niche market and value added. As a result, the opportunities to access high value markets are limited.
- There are ongoing challenges within the rail system including an inadequate number of rail cars frequenting grain terminals in the BC Peace.
- Production weaknesses for BC Peace growers:
 - Competition for affordable labour with other sectors.
 - Short growing season, with increasing variability.
- Unstable funding sources for long term research projects.

Opportunities

- There is potential to increase some crop production areas, for example the food grade pea market is expanding and lucrative.
- There is potential to expand the number of species to include crops like flax, triticale and camelina to supply into new markets like oilseed and biofuels industry.
- A feasibility study is being carried out to explore a producer rail loading station and market opportunities in the region.
- A five year proposal has been submitted with the Federal Agri-Innovation Program for over 1.3 million in total project costs.

Threats

- In August 2012, the federal government rescinded the legislation governing the Canadian Wheat Board, ending the monopoly on wheat and barley and putting these commodities to an open market system. There is a voluntary, transitional levy collection in place until 2017. These changes threaten national research funding and the sector is working with governments to determine how to move forward.
- Climate change trends of increased temperature and increased extreme weather events are leading to greater uncertainty around production.
- There are cumulative pressures from other industries, especially oil and gas. This puts a great time demand on producers as well as impacting their land base.

Markets

- BC exported \$45.6 million in grains in 2012, a 104 per cent increase from 2011. The top markets were the US, Japan and Colombia.
- BC exported \$12.4 million in oilseeds in 2012, a 10 per cent increase from 2011. The top markets were China, Japan and Mexico.
- Canola's top five importing countries are China, Japan, Mexico, United Arab Emirates, and the US. Only 3 per cent of production goes into animal feed production. Over 60 per cent of production is exported.
- Wheat's top five importing countries are the US, Mexico, Iraq, Japan, and Colombia. 60 per cent of Canada's production is exported; of that export 50 per cent goes to human food and 50 per cent goes to animal feed.
- Barley's top five importing countries are China, the US, Japan, Saudi Arabia, and Colombia. Only 30 per cent of Canada's barley production is exported for both malting and animal feed.
- Oats are primarily imported by the US. About 50 per cent of Canada's production is exported and 50 per cent is used for animal feed.
- Peas' top five importing countries are India, China, Bangladesh, the US, and Indonesia. 95 per cent of Canada's pea production is exported.

Areas of focus for 2013

- Support South Peace Grain Cleaning Co-op feasibility study to explore new market and rail access.
- Ongoing participation in water act modernization discussions, including support for water supply and demand inventory for agriculture sector in the Peace.
- Ongoing participation in climate action project being piloted in the Peace, including the

support for a much needed pest monitoring program and weather and climate data collection in relation to the commodity.

- Continue to support and work with national On Farm Food and Safety programs.

Industry requests

- Support for new model to replace Canadian Wheat Board national levy.
- Promote the retention of Harmonized Sales Tax.
- Looking for support to complete water supply and demand inventory for the Peace.
- Looking for support for a pest monitoring program in BC, to compliment Canada's ongoing monitoring.

Representative Groups/Associations

- BC Grape Growers Association, www.grapegrowers.bc.ca
- BC Wine Institute, www.winebc.org
- BC Grape Wine Council, www.bcwgc.org
- Wine Island Growers Association, www.wiga.ca

Industry Description

- The BC industry is composed of 864 vineyards.
- There are over 9,000 acres of wine grapes with about 200 acres of fresh market grapes.
- Almost all of the fresh grapes and wine grapes are sold within BC with some exported to Alberta.
- The industry has grown rapidly in recent years as many tree fruit growers have converted to wine grapes from apples. Previously uncultivated land has also been planted to grapes.
- Industry expansion is slowing as a result of declining grape prices which stem from a large supply.
- Recent winter injury-free winters have helped the larger crops in 2012 and the projected 2013 crops. Some growers who have suffered winter injury more than others are facing a difficult challenge.
- Wineries are increasingly looking for high quality grapes and lower quality grapes are not accepted or heavily discounted. Increasing crop levels are resulting in some grapes not under contract with no markets.

Statistics

- BC's grape growers have doubled production since 2000, in concert with the demand for high-quality grapes from provincial wineries.
- In 2011, BC produced 20,000 tonnes of wine and table grapes on over 9,000 acres.
- The majority of the production area is located in the Thompson-Okanagan (90 per cent), followed by the Vancouver Island (6 per cent), the Lower Mainland (3 per cent), and the Kootenay region (1 per cent).
- Total farm gate receipts in grapes exceeded \$39 million in 2011, an increase of 15 per cent over the previous year, accounting for more than one-third of Canada's grape receipts.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	0.4 Industry Specialist, with additional support from plant health, and marketing staff.
Notable Program Funds	<i>This sector was eligible for programs that were open to all sectors through Growing Forward, such as the Canada-BC Agri-Innovation program, and the provincial Buy Local program.</i>
Business Risk Management Funds (2010-2012)	AgriStability: \$180,000 Production Insurance: (federal & provincial) \$5.8 million AgriInvest (2008–2011): \$260,000

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BC grape growers receive higher prices than growers in many other wine producing regions.
- The industry is well organized and represented through the BC Grape Growers Association.
- Research and development levies are collected and directed by the BC Wine Grape Council.
- Development of a sustainability certification program for wine will bring long term benefits.

Weaknesses

- An increasing number of new plantings, although they are slowing. Too much grape production will likely result in low market returns.
- Potential quality issues with new growers.
- Potential winter injury during any cold winter.

Opportunities

- All grapes grown in BC are sold or processed by BC wineries.
- Gradual increases in production can allow market adjustments for BC wines avoiding drastic pricing changes.
- A projection of the future market potential for BC wines would be very beneficial.

Threats

- Many wineries are building inventories of wine which could impact on grape prices in 2013.
- Growers need to secure contracts with wineries to ensure sales. Uncontracted varieties are unmarketable.

Markets

- In 2012, BC exported \$0.6 million in grapes, a 61.3 per cent decrease from 2011. The top markets were the Netherlands, Barbados and China.

- Increased marketing and promotion by local wineries is necessary to ensure good prices for growers.
- Ice wine creates lots of publicity, although less than 200 tonnes of grapes are processed in that manner.

Areas of focus for 2013

- The industry is developing sustainable certification programs for growers which could provide added focus for BC and Alberta consumers and keep them loyal to BC's Vintner's Quality Alliance wines.
- The 2013 spring has been mild and more normal which may result in much higher production than recent years. This is a concern as some wineries are already refusing grapes from this year's crop.
- The BC grape industry faces, in contrast to a lot of grape growing areas, relatively minimal insect and disease pressures, however, this is changing and the industry is looking for funding to research trunk diseases that are of increasing concern.

Representative Groups/Associations

- Flowers Canada Growers, www.flowerscanadagrowers.com
- United Flower Growers Co-operative Association (UFG), www.ufgca.com

Industry Description

- The floriculture sector is highly competitive and is technology and capital intensive.
- Floriculture growers cultivate a wide range of potted foliage and flowering plants, cut flowers, and annual bedding plants. Potted plants account for 53 per cent of annual sales, followed by bedding plants at 20 per cent, cut flowers at 17 per cent, and cuttings at 10 per cent.
- The BC floriculture sector accounts for 22 per cent of national farm gate sales, ranking second to Ontario.
- Producers in BC enjoy some of the lowest production costs in Canada because of our mild climate, maximum growing season length, and the availability of good quality water. In addition, the sector's strong ties to Europe have permitted the industry to keep abreast of the latest advances in production techniques and new technology.
- The greenhouse sector has continued to benefit from the low cost of natural gas; however, the commodity price has gradually increased in the past year from \$1.92 to \$4.13 per million British Thermal Units.
- Ninety per cent of the total production area is located in the Lower Mainland and southern Vancouver Island regions.
- The UFG operates a flower auction that provides a "spot" market for locally grown product. It has annual plant sales in excess of \$45 million, which accounts for 16 per cent of industry sales. The auction enables growers to specialize and to focus solely on production.
- Operating expenses increased 5 per cent in 2011. Payroll accounted for 33 per cent of expenses, followed by plant material purchased for growing on at 23 per cent, fuel at 6 per cent, and electricity at 3 per cent.
- The main distribution channels are mass market chain stores (37 per cent) and domestic wholesalers (22 per cent), followed by retail florists (13 per cent) and other greenhouses (11 per cent).

Statistics

- The sector underwent considerable growth in the 1990s, but has seen declines of 28 per cent in production area and 10 per cent in sales since 2007.
- More than 65 hectares of production area has been lost since 2007.

Table 1. Production area and total sales for the floriculture sector

Year	Production Area		Total Sales	
	(ha)	Annual per cent Change	(\$ million)	Annual per cent Change
2011	174.4	-0.7 per cent	\$293.6	+3.4 per cent
2010	175.6	+11.6 per cent	\$284.0	+2.6 per cent
2009	157.4	-6.0 per cent	\$276.8	-1.4 per cent
2008	167.5	-31.1 per cent	\$278.2	-15.1 per cent
2007	243.0	-1.3 per cent	\$327.8	+3.2 per cent

Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents	0.5 Greenhouse specialist
Notable program funds	2012 Greenhouse Carbon Tax Temporary Rebate Program: \$1.6 million
	2013 Greenhouse Carbon Tax Relief Grant Program: (estimated) \$1.2 million
	Buy Local program: \$62,500
Business Risk Management funds (2010-2012)	AgriStability: \$1.4 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- The UFG operates the only flower auction in Western Canada. The auction is a very important market option for local growers. In recent years, however, the auction has seen their sales decline.
- The UFG is modernizing the auction to expand their market outside the Lower Mainland and to become more efficient. These changes are enabling the auction to improve their bottom line.

Weaknesses

- A lack of skilled and unskilled workers is a continual issue for the sector. The sector relies on continued access to temporary farm labour to meet their needs for unskilled workers.
- Although farm cash receipts are high compared with other sectors, the floriculture sector is challenged by increases in the cost of inputs (e.g. natural gas) and the cost to comply with government regulations such as the carbon tax. As a result the current 80 per cent rebate is welcomed.

- The sector is also challenged by: declining consumer demand; poor spring weather which discourages home gardening; continued downward pressure on prices; and reduced competitiveness due to appreciation of the Canadian dollar.

Opportunities

- The sector is very interested in opportunities to reduce energy costs through on-farm energy production, such as cogeneration. Opportunities in this area are often limited by economic viability and government regulations. The Bylaw Standard on the use of cogeneration by greenhouses in the Agricultural Land Reserve was recently approved. The standard makes cogeneration a permitted use and addresses the regulatory zoning issue for compliant systems.
- Floriculture growers in the US and South America have access to a broader range of pesticides than growers in Canada. The lack of effective pest control products increases the cost of production and reduces the competitiveness of floriculture operations in BC. The sector needs expanded access to effective pest management tools, especially those products that are available to US growers.

Threats

- The sector is concerned about the Canada-Colombia Free Trade Agreement that came into force in August 2011 as it will reduce tariffs on trade between the two countries and may further increase imports of Colombian cut flowers. BC once produced large volumes of cut roses but the importation of cut roses from Colombia has displaced local production; in the past 10 years, there has been a 93 per cent reduction in the volume of domestic standard roses sold at the flower auction. Local production of cut gerbera and alstroemeria is threatened by imported product.
- There are a number of pests that could impact trade, should they be identified in the US or Canada. These situations arise quickly, usually cannot be predicted, and can have a catastrophic effect on the impacted operations. For example, Chrysanthemum White Rust (CWR) is a regulated quarantine pest in Canada. If CWR is detected in a crop of chrysanthemums, the federal regulators will order the crop to be destroyed and the producer will receive no compensation.

Markets

- BC exported \$56.8 million in plants, bulbs and flowers in 2012. The top markets were the United States (US; \$54,070,519) and the Netherlands (\$2,244,321). This includes all floriculture and nursery products.

Areas of focus for 2013

- Work with other agencies to lessen the negative impact of new regulations on the floriculture sector. The ministry should continue to be engaged in discussions on:
 - proposed changes to the Agricultural Waste Control Regulation and the *Water Act*,
 - implementation of recent amendments to the Recycling Regulation,
 - maintenance of ditch drainage systems to protect farmland from flooding, and
 - options to lessen the impact of the carbon tax on agriculture.
- Assist the industry to develop management strategies for new and established pests, which includes work on pesticide registration.

Representative Groups/Associations

- BC Vegetable Marketing Commission (BCVMC), www.bcveg.com
- BC Greenhouse Growers' Association, www.bcgreenhouse.ca

Industry Description

- The BC greenhouse vegetable sector is a capital-intensive industry that relies on state-of-the-art greenhouse facilities and leading-edge production practices to produce high quality vegetables for the fresh market.
- The sector accounts for 20 per cent of total crop revenue in BC but uses only 0.04 per cent of the land in crop production.
- The sector ranks second in Canada, accounting for 25 per cent of the total greenhouse vegetable production area and sales.
- More than 95 per cent of the production area is located in the Lower Mainland.
- The crops produced include cucumbers, eggplant, lettuce, peppers, and tomatoes. Tomatoes and bell peppers represent 78 per cent of total sector sales. To improve profitability, the sector is expanding the production of novel types and varieties of vegetables, such as mini, heirloom and high sugar varieties.
- The production of greenhouse vegetables is regulated in BC and producers must apply to BCVMC for production allocation.
- There are 66 commercial operations registered with the BCVMC; 42 of these are located in the lower Fraser Valley and account for 96 per cent of the production area. The remaining 24 only account for 4% of the production area and are located in the Okanagan and Vancouver Island

Statistics

- The area planted has increased steadily since 2007 (Figure 1). In 2011, there was a small increase in production area (12.4 hectares; ha) and the trend continued in 2012 with the addition of 6 ha of new production area.
- Total sales fluctuate between years due to annual changes in total production area and product prices (Figure 1).

Figure 1. Total area planted and sales for the greenhouse vegetable sector (Source: BCVMC)



- Operating costs continue to increase; the two largest components are payroll and fuel, which account for 24 per cent and 15 per cent respectively of total operating expenses.
- The greenhouse sector has continued to benefit from the low cost of natural gas; however, the commodity price has gradually increased in the past year from \$1.92 to \$4.13 per million British Thermal Units. The price is increasing due to a reduction in inventory that is a result of a decline in drilling activity.

Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents	0.35 Industry Specialist, plus support from staff in Plant Health, Environmental Farm Planning, Regional Agrologists, Strengthening Farming, etc.
Notable Program Funds	2012 Greenhouse Carbon Tax Temporary Rebate Program: \$6 million 2013 Greenhouse Carbon Tax Relief Grant Program: \$5.2 million (estimated)
Business Risk Management Funds	AgriStability (2010-2012): \$0.5 million AgriInvest (2008-2011): \$0.7 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Local growers are very dedicated and innovative, and the industry has strong ties to the Dutch greenhouse sector. These ties assist the sector to keep abreast of the latest research findings from the Netherlands.
- Regulation of production by the BCVMC leads to stable supply.

Weaknesses

- The industry association is strong, but has relatively limited resources.
- Almost 60 per cent of the production area in the Lower Mainland can be heated with wood biomass. In the past, operators had difficulty obtaining wood during periods when demand was high. This could become an issue again as the price of natural gas increases and growers switch back to biomass.

Opportunities

- The sector is working with the Canadian Horticultural Council and the Certified Greenhouse Farmers to establish a definition of greenhouse-grown vegetables which will differentiate greenhouse and protected cultivated products in the marketplace. While they hope to increase their desirability through this differentiation, it is also possible (in the wake of the new bilateral agreement between the US and Mexico) that consumers will choose cheaper products from Mexico.
- The sector is very interested in opportunities to reduce energy costs through on-farm energy production, such as cogeneration. Opportunities in this area are often limited by economic viability and government regulations. The Minister's Bylaw Standard on the use of cogeneration by greenhouses in the Agricultural Land Reserve was recently approved. The standard makes cogeneration a permitted use and addresses the regulatory zoning issue for compliant systems.
- There are potential economic benefits to the sector of improved access to carbon offsets through the Pacific Carbon Trust for early-adopters of technology.

Threats

- Appreciation of the Canadian dollar and increases in the cost of inputs are squeezing industry margins and eroding the sector's competitiveness. The BC carbon tax is a major concern of the sector and the current 80 per cent rebate is welcomed. Industry contends that it directly impacts competitiveness and represents a significant proportion of the profit margin.
- The volume of greenhouse vegetables in the North America market continues to increase due to expansion in Mexico. The area of protected cultivation in Mexico increased from 750 hectares in 1999 to 15,000 hectares in 2010. About 50 per cent of the production area is low technology shade houses. Mexico has also increased the amount of product they supply

during the shoulder seasons when prices are typically the highest during the year. Overall, these changes are putting downward pressure on prices.

- Some greenhouse operations have installed high-intensity light systems to meet customer demand for year-round crop production. High operating costs and public opposition to light emissions has discouraged further expansion in lighting. Three greenhouse operations have chosen to expand in the US where the climate permits year-round production. This expansion weakens the local industry and is a lost opportunity for job creation and economic growth in the province.
- There are a number of pests that could impact trade, should they be identified in the US or Canada. These situations arise quickly and usually cannot be predicted. In the past few years, the US banned the importation of peppers and tomatoes from countries for two regulated pests, false codling moth and tomato leafminer.

Markets

- The sector relies heavily on the export market.
- BC exported \$126.4 million in greenhouse vegetables in 2012, with over 99 per cent being shipped to the US. Top exports include tomatoes (\$59.3 million), peppers (\$56.3 million) and cucumbers (\$12 million).
- To help facilitate market diversification, the ministry commissioned a study for industry through an international market intelligence provider that analyzed opportunities for greenhouse vegetables in China and Japan.
- Regarding imports, Mexico is the largest supplier and accounts for 82 per cent of total imports. The US represents less than 10 per cent of imports. The quantity of imports from Mexico is increasing steadily, whereas it is declining from Europe and is stable from the US.
-

Areas of focus for 2013

- Ensure smooth delivery of the 2013 Greenhouse Carbon Tax Relief Program.
- Work with industry to deal with a variety of issues, including minor use pesticide prioritization and registration, cogeneration, etc.
- Work with Ministry of Agriculture staff and other agencies to lessen the negative impact of new regulations on the sector. The ministry needs to be engaged in discussions on proposed changes to the Agricultural Waste Control Regulation and the *Water Act*, and implementation of recent amendments to the Recycling Regulation.

Representative Groups/Associations

- Mushrooms Canada, www.mushrooms.ca
- The Vietnamese Mushroom Growers Society of BC

Industry Description

- Mushroom production in BC is ranked within the top 10 in farm gate sales and is the second largest producer in Canada, following Ontario, and accounts for more than 30 per cent of national production. The main crops are white and brown coloured strains of *Agaricus* button mushrooms. A small amount of specialty mushrooms are also produced.
- The BC industry has a reputation for growing high quality mushrooms.
- Production takes place in capital intensive barn type structures. These buildings have multiple growing rooms and use a multi level system of growing beds. New crops are started weekly providing continuous year-round supply, which is sold in an open marketing system.
- The production of specialized mushroom compost is an integral part of the industry as it provides nutrients needed for mushroom production. A continuous, high quality supply of compost is replaced weekly; at the beginning of each production cycle. This requires about 2,000 cubic yards per week of broiler dry poultry waste and consequently plays a large and beneficial role in reducing excess nutrient load in the Fraser Valley.
- About 1,360 people are directly employed on farm in the BC mushroom sector. These jobs provide year-round employment. A low level of formal education and English as a second language is among much of the labour force.

Statistics

- In 2011 the crop was estimated at over 70 million pounds with a farm gate value of approximately \$87 million.
- The average producer price of \$1.35 per pound has remained stable for many years.
- There has been a trend of increased production with a fewer number of farms. Since 2000 production has increased by over 50 per cent, from 46 million pounds to 70 million pounds in 2011.

Ministry Resources

This sector was eligible for programs that were open to all sectors through Growing Forward, such as the Canada-BC Agri-Innovation program, and the provincial Buy Local program.

Full Time Equivalents	0.2 Industry Specialist, plus additional ministry support as required
Notable Program Funds	The mushroom sector has difficulty accessing government funded programs due to lack administrative ability within an industry organization.
Business Risk Management	BRM funds that go to the mushroom sector are included

(BRM) Funds (2010-2012) within the Other Fruits and Vegetables category.

Markets

- Almost all sales are fresh market and about 60 per cent of this is exported to the United States (US).
- BC exported \$69 million in mushrooms in 2012, primarily to the US.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BC mushroom industry's strong infrastructure consisting of compost production, growing, packing and distribution supports the strong demand for fresh *Agaricus* mushrooms.
- The short shelf life of the fresh product provides a competitive advantage over long distance competitors.
- The major packing facilities have active food safety programs required for most major customers.
- Recent investments in new compost technology have increased on-farm production and energy efficiency. This technology has not been widely adopted by the US competitors.

Weaknesses

- Farm profits are being eroded resulted from increasing production cost and stable farm gate prices.
- The foreign exchange rate with US and strengthening Canadian dollar has eroded packer returns.
- High input, land and labour costs and carbon tax are competitive disadvantages with US and domestic competitors.

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Opportunities

- Demand could be improved through increased communication on research-backed health messaging, for example, that mushrooms are a natural source of Vitamin D and can reduce energy and fat intake. This could be carried out through programs as the Buy Local initiative and opportunities for product promotion and novel product development.
- Access to carbon credits could improve energy efficiency.

Threats

- The foreign exchange rate with US and strengthening Canadian dollar has eroded packer returns.

- Labour shortages. Many farm operations have come to rely on the Low Skills Program which is becoming more difficult to access. The second generation of existing local workers are not interested in harvesting mushrooms.

Areas of focus for 2013

- Research and industry development on new pest control product.
- Value added opportunities for spent mushroom substrate.
- Reduced water consumption and waste water management.

Representative Groups/Associations

- Canadian Nursery and Landscape Association, www.canadanursery.com
- BC Landscape and Nursery Association (BCLNA), bclna.com

Industry Description

- The nursery sector is a highly competitive and dynamic sector.
- The sector propagates thousands of different species of perennials, vines, ground covers, shrubs and trees that are used to beautify public and private landscapes and to re-vegetate damaged native ecosystems. The sector also produces berry and tree fruit plants for home gardens and commercial orchards.
- Nursery crops are either grown in the field or in containers. Field-grown nursery stock ranges in size from one-year-old whips to mature specimen trees. Container stock is grown in a wood-based soilless media.
- Nursery crops are grown on 3,635 hectares of agricultural land. Field-grown products account for 72 per cent of the production area and container stock accounts for 28 per cent.
- Producers in BC enjoy some of the lowest production costs in Canada because of minimal over-wintering requirements, maximum growing season length, and the availability of good quality water. These climate advantages have helped the sector to become the second largest producer of nursery stock in Canada, accounting for 30 per cent of national sales.
- Production nurseries are present in all regions of BC. The majority of the production area is located in the Lower Mainland (70 per cent), followed by the Okanagan (17 per cent), Vancouver Island (7 per cent) and Kootenay (6 per cent) regions.

Statistics

- The sector employs 4,085 workers and generates \$192 million in farm gate sales.
- Nursery sector growth has stalled the past five years. In 2011, sector sales declined 8 per cent, which was the first significant decline since 2005, and production area declined 0.2 per cent. Production area has declined in five of the past seven years, and has declined 8 per cent since 2006.
- Recent declines in sales are attributed to poor spring weather, increased competition from United States (US) producers and decreased demand. US sales per household of ornamentals have declined by 35 per cent in the past 10 years.

Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents

0.35 Industry Specialist. Additional support from program areas across the ministry such as plant health, food safety

Notable Program Funds	and BRM staff. 2013-14 Greenhouse Carbon Tax Rebate Program: \$100,000 (estimated). Buy Local Program: application on waitlist
Business Risk Management (BRM) Funds	Agristability (2010-2012): \$3.4 million AgriInvest (2008-2011): \$1.0 million

Markets

- In 2004, nursery exports were valued at \$91 million. Since then the industry has virtually abandoned the US market and export sales have declined to \$4 million.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Society recognizes the aesthetic and environmental benefits of landscape plants and places a high value on planting nursery stock to green our cities.
- The industry has access to a good supply of quality irrigation water and a moderate climate.
- The BCLNA is a strong advocate for the sector and maintains strong ties with other provincial, state and national associations in Canada and the US. The industry has strong individual leaders that are recognized outside of BC for their innovation in production and marketing.
- The "BC Landscape Standard" provides a reference for normal and acceptable practices for landscape construction and creates a higher level of professionalism within the sector.
- Pest certification programs that assure clients nurseries in BC take steps to minimize the risk of spreading *Phytophthora ramorum* (*P. ramorum*), a disease which causes damage and would kill trees, shrubs and herbaceous perennials if they were not quarantined and destroyed under federal regulation. The certification program included annual nursery testing, and mandatory biosecurity, best management, and traceability practices.

Weaknesses

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- The price of nursery stock is declining due to excess supply, US nurseries selling at discounted prices of 50 per cent or more, and consolidated purchasing by chains.
- BC nurseries find it difficult to compete in the US market due to appreciation of the Canadian dollar and increases in costs of production, including the provincial minimum wage and the carbon tax rate, and the increase in the cost of fuel and petroleum-based products.
- The agricultural workforce is aging and it is difficult to attract young people to the industry. The nursery sector relies heavily on foreign worker programs because few local workers apply for manual labour positions.

Opportunities

- Despite recent reductions in the amount of nursery stock in the market, there is still too much product in the market for many crops. Further corrections are necessary to balance supply and demand.
- The BCLNA developed a nursery certification program in 2004 to minimize the risk of spreading, *P. ramorum*. The program was recently integrated into the industry's new, national certification system, Clean Plants, but low participation is jeopardizing the system.

Threats

- The market for nursery stock in the US is soft due to a low rate of new house construction and a high rate of unoccupied residences. The reduction in domestic demand and the depreciation of the US dollar have driven US nurseries to more aggressively market their product in Canada, which is harming sales of local nurseries.
- Several nurseries have been fined for having coloured fuel in their delivery vehicles in the US. Industry reports they used to be eligible for a rebate of the road tax but the legislation was reinterpreted and the rebate has been removed.

Areas of focus for 2013

- Promotion of the benefits of local products to increase purchase of BC-grown commodities.
- Work with other agencies to minimize the impact on industry of pending changes to the Agricultural Waste Control Regulation, the *Water Act* and recent amendments to the Recycling Regulation.
- The ministry needs to be engaged in discussions on:
 - maintenance of ditch drainage systems to protect farmland from flooding and species at risk in the waterways,
 - mechanisms to prevent the mistreatment of foreign temporary farm workers,
 - potential provincial ban on the use of cosmetic pesticides.
- Assist the industry to develop management strategies for new and established pests, which includes work on pesticide registration.

Representative Groups/Associations

- Certified Organic Associations of BC, www.certifiedorganic.bc.ca
- Canada Organic Regime / Office, www.inspection.gc.ca/english/fssa/orgbio/stainte
- Canadian Organic Trade Association, www.ota.com/otacanada/programs
- Organic Agriculture Centre of Canada, www.oacc.info
- Organic Federation of Canada, www.organicfederation.ca

Industry Description

- Over 80 per cent of organic products sold in BC at the retail level are imported, primarily from the United States (US), as demand for organic products far exceeds provincial supply.
- According to the BC Organic Industry Overview, in 2005, 482 farms were certified in BC; now, there are approximately 500 organic producers. In 2005, there were 103 certified organic processors in BC and now there are 110.
- Organic field vegetables are produced throughout the province with the majority in the Okanagan, Similkameen, southern Vancouver Island, Gulf Islands, and the Lower Mainland and Fraser Valley regions.
- The estimate of total certified organic acreage for vegetables is difficult as reporting tends to be mixed up between “total vegetables” and other specific vegetable categories. It is estimated to be less than 1,000 hectares for 2005.
- Tree fruits comprise approximately 30 per cent of the acreage within the organics sector and have well-established marketing channels through independent and cooperative packing houses. These same packing houses also buy and sell vegetables from their growers who supply fruit.
- Organics are marketed in a variety of ways. Many small market garden farms tend to use direct marketing channels such as farmers markets, direct farm sales, U-pick operations, community-shared agriculture and box delivery services. Some farms use multiple channels for marketing, often moving product through a wholesaler and maintaining some form of direct marketing within their local community.
- There are two major wholesalers in the Lower Mainland certified as handlers of organic product, who carry exclusively organic produce. Mixed wholesalers may source from the certified wholesalers or they may source directly from some of the larger volume, established producers, or ones in specific geographic areas.
- The Certified Organic Associations of BC (COABC) is the authorized administrator of the BC Certified Organic Program. They are responsible for development and implementation of the BC Organic Standard and are the primary accreditation agency in BC.
- The Canadian Organic Regime, implemented in June 2009, is a regulatory accreditation and certification system for the organic designation of internal and imported product. This work was led by COABC in collaboration with the federal government and the Canadian organic community.

Statistics

- The organic market in Canada is the 4th largest in the world valued at \$3.7 billion per year in sales. BC accounts for 22 per cent of organic food and beverage sales in Canada (\$662 million in 2012).
- Statistics Canada information on organics needs to be interpreted with caution as the definition of organic is not entirely understood by respondents and “certified” organics gets mixed in the reporting with non-certified organics.
- Statistics on production of organics in BC have not been collected by one organisation. BC farms can be certified by many certification bodies, both within and outside of BC and these organizations don’t necessarily share their information.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	0.25 Industry Specialist, plus additional support through other sector specialists and policy analysis.
Notable program funds	Buy Local: \$100,000
Business Risk Management funds	Not accessible at this level

Strengths, Weaknesses, Opportunities and Threats

Strengths

- The BC Certified checkmark logo, allows BC certified organic producers who are certified to the national standard to use the words “certified organic” in their labeling. The presence of a regulated program in British Columbia gives reliable, government-backed assurance of the organic claim in the marketplace.
- In spring 2013, the Standards Council of Canada will invest \$600,000 for the five year review of the Canada Organic Standard, currently required under Canadian General Standards Board rules. Through the Canada Organic program, producers have access to European Union (EU) and US markets.
- COABC administers The Federal Organic Sector Development Program (OSDP) with oversight from BC Ministry of Agriculture (ministry), Agriculture and Agri-Food Canada (AAFC) and the Investment Agriculture Foundation. The program requires a substantial input of industry dollars and does not recognize in-kind to trigger funding. Due to lack of resources in the organic sector, these restrictions are barriers to utilization of these dollars. A recent change in the funding ratio to 20:80 has encouraged more projects. The OSDP fund ends December 2013.

Weaknesses

- The federal organic standard prohibits the use of qualifiers in front of the word “organic”, such as “certified”, on labeling. This has increased confusion in the BC marketplace where consumers have been conditioned to look for the phrase “BC Certified Organic”. The ministry is continuing to explore the issue with COABC.
- Certified organic produce competes with claims such as natural or organic that is not certified

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- There is a lack of resources for large- and small-scale research in areas of innovation in fertilizer and irrigation management, production and post-harvest handling.
- Seasonality restricts availability and short shelf-life remains an issue.
- Livestock infrastructure is in its’ infancy.
- Production capacity and post-harvest quality improvements are required to make improvements in the value chain.
- Retaining skilled labour is an issue due to the seasonality of the produce industry and characteristically low wages. The shrinking labour pool has aged in line with the farm community.
- Poorly developed relationships between vendors and suppliers are an ongoing issue that limits stability in the marketplace.
- Poor statistical information.

Opportunities

- COABC has launched a Small-Scale Certification Project in an effort to encourage non-certified operations to come under the umbrella of certification in BC.
- The National Organic Value Chain Roundtable is developing a branding strategy for organics.
- Transitioning existing conventional acreage to organics is a potential source of growth for the sector.
- The demand for organics and local is relatively strong in BC, with Vancouver claiming to be one of the biggest organic consumers in the world.

Threats

- Fallout from the 2008 economic downturn negatively impacts demand for organics in the marketplace. Growth in “natural” food products has outpaced growth in organics since the downturn. There is significant consumer confusion about what “natural” means vs. “organic”.
- Compliance with the Canada Organic Standard adds to the cost and complexity of certifying and may create further resistance to certify.
- As provincial certification is not mandatory, it is likely that certified organic producers compete against uncertified producers who are marketing themselves as organic.
- Certification bodies may be required by buyers to become International Standards

Organization-certified in order to supply product that can be shipped outside of the province. This has the potential to increase costs to members who embrace the BC Certified Organic Program as a lower cost option.

- Imports from the US and Mexico flood the market affecting local pricing due to competing economies of scale, cheaper labour, land and input costs.

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Markets

- Canadian organic exports are valued at \$400 million per year. Data on BC's organic exports is not available.
- With organic equivalency agreements with the US and the EU, Canada now has access to 96 per cent of the global organic market, valued at \$59 billion per year. Canada is pursuing agreements with other trading partners, such as Japan, to facilitate the unfettered trade of organic products.

Areas of focus for 2013

- According to the Organic Federation of Canada, the federal regulation has burdened small-scale producers and resulted in driving them away from certification or towards increasing their scale of operations. COABC is also facing challenges with attracting and retaining small-scale producers.
- In 2012, COABC developed a new sector strategic plan with key performance areas identified.
- COABC has developed a position statement demanding mandatory labeling and discouraging use or development of genetically modified organisms; and includes a demand that the provincial government require seed suppliers to report sales of genetically modified seed in BC.

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Representative Groups/Associations

- BC Pork Producers Association, bcpork.ca/producers/bc-pork
- BC Hog Marketing Commission, bcpork.ca/producers/bc-hog-marketing-commission

Industry Description

- BC's hog industry is concentrated in the Fraser Valley. The average operation manages 350 sows (farrow-to-finish) and markets about 7,000 hogs annually.
- There are 20 licensed pork producers who supply about 10 per cent of all pork consumed in BC and provide processed pork for export.
- The industry has been served for over 30 years by two BC privately owned and operated meatpacking plants:
 - Britco, a federally inspected plant in Langley, with a capacity of 7,000 head per week, sources about 750 head per week from BC farms and the remainder from Alberta.
 - Johnston's, a provincially inspected plant in Chilliwack, with a capacity of 3,000 head per week, sourcing 2,000 head per week from BC farms.
- Two categories of hogs are marketed in BC; round hogs (also known as BBQ hogs; 40 - 45 kg) and market hogs (90 - 95 kg). 80 per cent of BC hogs are shipped as 'market hogs'.
- Approximately 92 per cent of pork consumed in BC is classified as commodity pork (basic cuts, such as bellies, butts, hams, and loins) while the other 8 per cent is value-added specialty pork.
- As of January 2013, every licensed BC hog operation has been registered and validated under the National Premises Identification Program. This program will help minimize the impacts of a disease outbreak or a food safety crisis by reducing response time; reinforce domestic and export market access by responding to customer preference for traceability, and improve the competitiveness of the industry.
- In 2014, federal legislation will require all hog movements to be recorded and reported to the national PigTrace database within 48 hours.

Statistics

- BC farm cash receipts and total hogs marketed declined by 6 per cent and 13 per cent respectively in 2011 compared to 2010.

Table 1. Market Price History for BC Pork

Year	Average Base Price (\$/100 kgs)
2009	\$133.09
2010	\$148.90
2011	\$167.34
2012	\$162.44
2013(Weeks 1-18)	\$157.49

- Since the beginning of 2012, significant increases in feed costs have altered profit margins from being slightly positive to significantly negative. A 2013 study by the BC Pork Producers Association (BCPPA) showed BC producers losing a minimum of \$25 per market hog.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	0.15 Industry Specialist, 0.10 Agrologist, 0.05 Animal Health
Notable Program Funds	Production Protocol Enhancement Program and Market Development Fund: approximately \$2.7 million since 2009
Business Risk Management Funds	AgriStability: (2010-2012) \$1.1 million AgriInvest: (2008 – 2011) \$240,000

Strengths, Weaknesses, Opportunities and Threats

Strengths:

- The sector has a strong infrastructure that includes feed industry, slaughter-processing capacity, transportation, herd health, marketing, and financial services.
- The sector is located in close proximity to a large and growing affluent market in the Lower Mainland that offers a wide range of niche markets.
- The industry used leveraged government funds to develop a BC Pork Strategic Marketing Plan in 2009. From this work, \$2.7 million was provided by the BC Ministry of Agriculture to assist the BC pork industry to transition into more value-added, specialty pork production and to support advances in production, herd health, marketing and legislation.
- The relatively small size of the sector provides the opportunity to change producer attitudes and production processes and create value-chains.
- Many producers are long-time family farms who have persisted through difficulties and are committed to changes to remain in business.
- The Canadian swine industry will publish an updated Code of Practice for Pigs in December 2013.

Weaknesses:

- The sector is highly vulnerable and unable to compete with low domestic market prices and high price volatility inherent in North American commodity pork prices.
- The BC Hog Marketing Commission (BCHMC) and BCPPA are financed solely from levies collected on every hog marketed in BC. The capacity of these organizations is limited as markets drop and producers exit.

- Feed costs are greater than the sum of all other operating costs for pork production. As most feed grains are imported, swine producers are vulnerable to changes in grain prices. Current predictions suggest a continuation of United States (US) drought conditions, keeping feed prices high.
- In 2008, the federal government guaranteed loans to producers which are now due to be paid; few are able to do so.
- Under the current cost-sharing agreement of 1:1, the Hog Industry Development Fund (approximately \$500,000) is inaccessible to many applicants.
- Reference margins have been so low the past several years that Agristability has become ineffective in providing financial relief.

Opportunities

- BC producers supply only 10 per cent of the total amount of pork consumed in BC. The industry could garner support from consumers to create more value-added, specialty pork.
- The family farm concept is an asset in branding and marketing.
- Branded BC pork supported by a strongly developed infrastructure of traceability, food safety, biosecurity, and animal care, demonstrating quality, could be instrumental in attracting and securing new product market opportunities.
- Strategic market analysis and planning may indicate a significant industry benefit to identifying one of BC's two major processors to become the primary supplier of premium priced, value-added, specialty pork products to service niche markets in BC.
- In June 2012, the Canadian Pork Council proposed a rolling, multi-year 'levy schedule' that extends to 2015, with progressively larger levies being collected per hog marketed each year.

Threats

- A number of fast food companies, restaurants and food retailers have announced plans to eliminate gestation stalls (crates) from their pork supply chain by 2022. Producers will require significant capital investment in production facilities to change to systems that support group housing for gestating sows in order to maintain their market share and stay competitive.
- Producers in the Lower Mainland are vulnerable to the appearance of foreign animal diseases like hoof and mouth disease because of their proximity to imports.
- External events such as swine flu, circo virus, currency fluctuations, extremely low market prices, and high feed prices would devastate this industry.
- US economies of scale make it very difficult for BC's producers to compete.
- Any disruption of rail shipments of feed grains into BC would cause an immediate problem.
- US Country of Origin Labeling laws continue to disadvantage pork produced in Canada over pork produced in the US. Canadian hog exports to the US have declined by an estimated \$2 billion since 2008 when the legislation was introduced. The US has until May 2013 to ensure the legislation is compliant with World Trade Organization trade standards.
- As more BC producers exit the industry, it puts increased pressure on Johnston's to make

operational changes that include sourcing hogs from outside BC at much higher cost than locally raised hogs.

Markets

- In 2012, BC exported \$74.4 million in pork products, a 1.7 per cent increase from 2011. The top markets were China, the US, Russia, Japan and Taiwan.
- The majority of pork products exported from BC are derived from live hogs that are shipped from Alberta and Saskatchewan and then processed in the Lower Mainland.
- The majority of the 160,000-165,000 hogs raised in BC in 2011 and 2012 were processed to satisfy local domestic markets.

Areas of focus for 2013

- The BCHMC and BCPPA are focusing on the sustainability of their operations.
- Implementation of industry procedures with respect to recording and reporting animal movement to the national PigTrace database.
- Continued emphasis on marketing and promotions to raise awareness and enhanced recognition of the BC pork brand in the domestic marketplace.
- Introduction of the new national Code of Practice for Pigs in December 2013.
- Securing funding to complete Phase II for a BC Pork Strategic Marketing Plan to identify, quantify, and evaluate the economics of servicing domestic specialty pork niche markets in BC. Renewed emphasis on developing the value-chain concept for the BC pork sector from producer to retailer.

Representative Groups/Associations

- BC Potato and Vegetable Growers Association/Potato Industry Development Committee
- BC Vegetable Marketing Commission (regulatory), www.bcveg.com
- BC Fresh Incorporated (Licensed Marketing Agency), www.BCfreshVegetables.com
- BC Produce Marketing Association, www.bcpma.com
- BC Certified Seed Potato Growers Association

Industry Description

Overview

- Potatoes are the most important field vegetable crop grown in Canada with British Columbia contributing to less than 5 per cent (1,925,000 hundredweight) of annual national production (101,197,000 hundredweight).
- Although BC is relatively small, from a national standpoint, potatoes are the most valuable field vegetable crop grown in this province with a farmgate value of approximately \$43 million per year (2011). Potatoes are the main crop rotation for the majority of storage crop operations within the BC Lower Mainland.
- The majority of BC's potato production is located in the lower Fraser Valley. There are 45 growers and approximately 5,000 acres in production.
- Of the total volumes produced, the bulk is typically in the russet category followed by Kennebecs (white), reds, yellows, other whites and early nuggets.
- The majority of BC's potato production is table stock. Aside from a portion of the crop utilized for the fresh cut fry market, British Columbia does not grow for processing markets. This is mainly due to a lack of both processing infrastructure and production capacity.
- Industry market analysts are forecasting a difficult year and predict that it will require a 10 per cent drop in North American production in order for the industry to be profitable.

Supply regulation and trade

- Potatoes are a regulated crop. Growers are granted production quota from the BC Vegetable Marketing Commission.
- The BC table potato market is protected by an anti-dumping ruling which prohibits the marketing of imported potatoes below an established cost of production. This agreement has been in place for approximately 10 years and was most recently renewed in 2010.
- Production has increased in other Canadian provinces, Idaho, and North Dakota, resulting in a price decrease of 12 per cent for BC fresh market potatoes.

Statistics

- Annual farm gate receipts for potatoes normally exceed \$25 million (July to June).
- 2012 acreage increased by 4 per cent compared to prior and past three years' average. Yellows have the greatest increase (12 per cent) and whites are down (3 per cent).

- United Potato Growers of Canada reports a 14 per cent decrease in seed production in Western Canada with producers observing virus issues in the crop. Seed shortages are predicted for some producers in 2013.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	0.25 Industry Specialist, with additional support including plant health and regional agrologists
Notable Program Funds	School Fruit and Vegetable Program: The province has provided over \$26 million since 2005 (Ministry of Health lead).
Business Risk Management (BRM) funds (2010-2012)	AgriStability: \$8.8 million Production Insurance (federal and provincial): \$3.2million AgriInvest: (2008 – 2011) \$0.4 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Crop insurance programs have been developed for a basket of root crops common in the potato rotation (beets, rutabagas and parsnips) and also sweet corn reducing the level of risk to the sector associated with these crops.
- The sector is organized through their association, BC Potato and Vegetable Growers Association (BCPVGA) which provides strong leadership. There are strong links with the BC Seed Potato Growers Association.
- The Potato Industry Development Committee funds projects that address important industry issues and establish research priorities related to potato research, technology transfer and development, environmental management, market development, education and training.
- BC Fresh Inc. plays a major role in the value chain with potatoes. They operate as a member cooperative and handle 90 per cent of the potatoes marketed in the province. They have made progress in marketing potatoes and branding BC vegetables through local campaigns and initiatives such as the Buy Local program (currently on waitlist). They provide strong leadership in addressing quality issues and expanding market opportunities.
- The British Columbia Vegetable Sector Value Chain Roundtable was initiated in October 2010 in order to identify opportunities for innovation and collaborative partnerships and increase the presence and promote consumption of BC vegetables in the marketplace. The roundtable was initiated by the BC Vegetable Marketing Commission and is assisted by Ministry of Agriculture staff.

Weaknesses

- The BCPVGA provides strong leadership on important issues; they also gather and communicate to industry information such as market trends and opportunities for innovation. They argue they are stretched very thin and more resources are required.
- Growers no longer have an agency that deals with the issues around accessing seasonal agriculture workers from Mexico and other countries.
- An independent opportunities assessment conducted through the BC Vegetable Marketing Sector Value Chain Roundtable identified that there is a lack of detailed BC statistical and market information, related in part to the relatively small size of our horticulture sector but also due to lack of organization of many segments of the horticulture sector.

Opportunities

- Increased demand for local product has benefitted BC. With improvements to storage facilities, BC is aiming to position itself to supply product until May.
- Education of public to increase awareness of the benefits of potatoes is being carried out through the Agriculture in the Classroom Foundation (supported by BCPVGA). This program is steadily evolving in BC and should be viewed as a very efficient use of marketing dollars.
- The opportunities assessment referred to above included several recommendations for increasing the competitiveness of BC vegetables.
- The Canadian Horticulture Council – Potato Research Committee Working Group will play a strong role in the future in overseeing the coordination of research activities and continuing to monitor research needs. The strategy framework includes the development of a national coordinator position to successfully implement the National Potato Research and Innovation Strategy.

Threats

- Lack of level playing field with competitors over access to pest control products and cost of inputs.
- Availability of labour is a continuing threat to productivity.
- Competition for land with other more valuable crops is a continuing threat to the viability of annual crops such as potatoes.
- Canadian demand for potatoes has flat lined, combined with an increase in North American fresh market production.
- As a result of individual potato consumption decreasing, United Potatoes of Canada is recommending that 5 per cent (70,000 acres) of fresh potatoes should be taken out of the system. This is compounded by increased production across Canada and in the United States.

Markets

- Almost all potatoes in BC are marketed locally; with the exception of some interprovincial

sales with Alberta and Saskatchewan, nothing is grown for export.

- Seed potatoes are exported from BC at an annual value of \$7.7 million (2011).

Areas of focus for 2013

- The sector has identified the lack of level playing field with competitors regarding input costs as a competitiveness issue.
- Alternatives to, or replenishment of, the Potato Industry Development Council trust fund.
- Crop sectors are concerned that changes to BRM programs will not reflect their needs. Industry is concerned about the balance of programs shifting from recovery support and insurance programs to more emphasis on programs that encourage innovation or processing development. This issue is a concern to crop sectors where weather challenges and US trade issues are much bigger factors affecting competitiveness and production. Crop sectors have more reliance on BRM programs to meet immediate, unforeseen challenges that occur.

Representative Groups/Associations

- BC Chicken Marketing Board, www.bcchicken.ca
- BC Egg Marketing Board, www.bcegg.com
- BC Hatching Egg Commission, www.bcbhec.com
- BC Turkey Marketing Board, www.bcturkey.com

Industry Description

- Approximately 80 per cent of supply managed poultry occurs in the Fraser Valley. There is some chicken, turkey and table egg production in the Okanagan and on Vancouver Island.
- Supply management was set up to provide primary producers with a fair return, and to ensure a stable supply of consistently safe, high quality products to Canadian consumers. It is a regulated system that institutionalizes production planning and collective marketing among primary producers, at both the national and provincial levels, enabling them to balance the market (or pricing) power of processors.
- Supply management rests on three pillars:
 1. Domestic supply is managed through the allocation of production quotas.
 2. Imports are restricted through the application of tariffs and other border measures.
 3. The prices received by primary producers are set under government mandate to include the cost of production plus a margin. In this way domestic supply and demand are matched at a price level that ensures a fair return to primary producers.

Chicken production

- There are approximately 56 supply managed hatching egg producers which supply eggs to hatcheries that are hatched for broiler chicken production.
- Four main hatcheries provide broiler chicks and turkey poults for supply managed production.
- There are approximately 350 broiler chicken farms. All broiler hatching egg production occurs in the Fraser Valley.
- Specialty chicken production (also supply managed) includes Taiwanese Chicken, Silkies, organic, those raised without antibiotics and so forth.

Table egg production

- The industry has one main hatchery that hatches layer chicks for supply managed production.
- There are about 130 supply managed table egg producers which includes mainstream production and specialty production (organic, free range, free run, omega-3, etc.).

Turkey production

- There are about 65 supply managed turkey producers which include mainstream production and specialty (organic, free range).

Mainstream packing and processing

- Supply managed production supplies four federally inspected processing plants located in the Fraser Valley; there are also a number of smaller provincial plants throughout BC.
- One main grading station in Abbotsford handles most supply managed egg production. There are also a number of smaller grading stations throughout BC.

Non-supply managed production

- Commercial specialty (non-supply managed) poultry including ducks and geese, gamebirds (e.g. pheasant, quail), and squab (pigeon) are not supply managed. There are up to 50 farms, but the majority of production comes from three large producers. There is no cohesive association among the non-supply managed producers
- There are between 7,000 and 10,000 non-commercial or quasi-commercial poultry flocks in the Fraser Valley; plus large numbers throughout BC. These operators include a number of producers with permits from the boards and flocks that range from one or two up to several hundred
- Hatcheries that hatch chicks for small and non-supply-managed specialty flocks (for example, ducks, geese, and gamebirds) are federally regulated and located throughout BC.

Statistics

- Farm cash receipts from supply managed poultry production, including chicken, turkey, and table eggs were \$570 million in 2011.
- Direct and indirect contributions of all supply managed production; including chicken, turkey, and table eggs was \$1.1 billion.
- Poultry processing and egg grading contributes another \$1.35 billion.

Ministry Resources

Provincial funds directly attributable to this sector are listed here. Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	1 Avian pathologist (Plant and Animal Health Centre) 1 Poultry health/extension veterinarian (Plant and Animal Health Branch) Currently no Poultry Specialist
Notable Program Funds	Under Growing Forward 1 approximately \$180,000 was allocated to food safety projects (including poultry-related projects) which address Salmonella and Antimicrobial Use. The poultry sector accessed \$52,000 through the Provincial Buy Local Program
Business Risk Management Funds	AgriStability (2010-2012), \$192,000 AgriInvest (2008-2011), \$101,000

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Supply management ensures a consistent local supply of poultry and eggs.
- Prices are stable for producers and consumers.

Weaknesses

- Trade potential is limited when associated with supply management.
- There are high feed costs.
- Markets are more volatile for non-supply managed production.

Opportunities

- There is increasing demand for “local” foods, specialty products and branded products.
- Niche and ethnic markets for specialty bird production are growing. For example, growing segments include Taiwanese Chicken (a head-on, feet-on type of chicken for the Asian market) and Silkies (a black skin, white feathered bird used for soup in the Asian market).

Threats

- Prices for non-supply managed product such as squab are volatile due to imports.
- Federal efforts to enter into a number of free trade agreements threaten the supply managed system due to the perception that these systems are a barrier to importation of poultry products.

Markets

- In 2012, BC exported \$38.8 million in poultry products (including chicken meat, turkey meat and poultry offal), a 12.6 per cent increase from 2011. The top markets were Taiwan, Philippines, United States and Hong Kong.
- BC also exported \$2.7 million in eggs and \$0.8 million in live chickens in 2012.

Areas of focus for 2013

- Review of shell egg grading regulations to ensure monitoring and enforcement of the sales of ungraded eggs at food premises and eating establishments.
- Ministry staff are in discussions with the Farm Industry Review Board and the sector about establishing a self-insurance program under the authority of the poultry boards and the commission.

Representative Groups/Associations

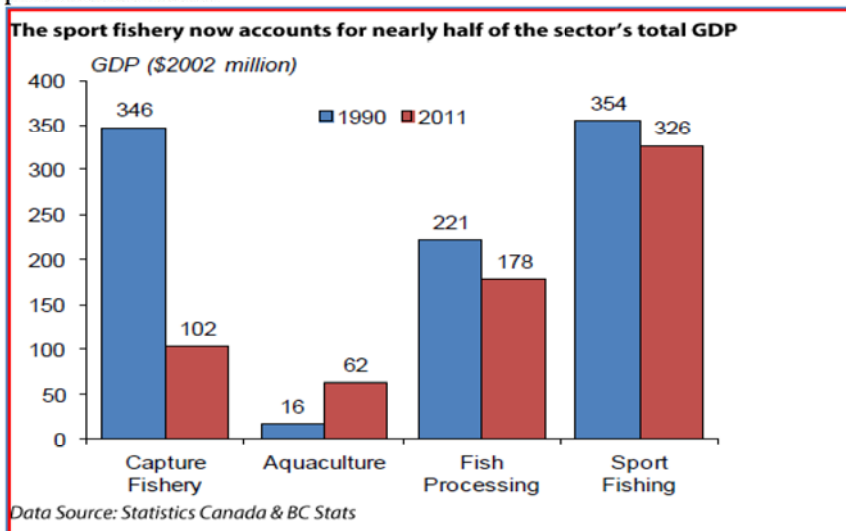
- Sport Fishing Institute of British Columbia, (SFI), www.sportfishing.bc.ca
- Sport Fishing Advisory Board, (SFAB), the official advisory body to the Department of Fisheries and Oceans, www.pac.dfo-mpo.gc.ca/fm-gp/rec/sfab-ccps-eng

Industry Description

- Fisheries and Oceans Canada (DFO) is responsible for tidal recreational fishing. BC provides policy advice on issues such as commercial and recreational allocation, catch monitoring and is responsible for recreational shellfish harvesting reserves.
- BC has a reputation for being one of the greatest saltwater fishing destinations in the world. The most important recreational fishing species are pacific salmon and halibut, but bottom fish and shellfish are also harvested.
- The recreational fishing community is an important user and a partner in management and stewardship of the resource.
- Sport fishing is a major contributor to local economies, benefiting those that provide direct fishing services and service providers such as transportation and accommodation providers.
- A variety of fishing opportunities are available, from shoreline fishing to staying at world class lodges.

Statistics

- Approximately 300,000 licence holders participate in the diverse fishing opportunities provided in BC.



- In 2011, the sport fishing industry accounted for \$326million; nearly half of the total gross domestic product (GDP) of BC's fisheries, aquaculture and seafood processing sectors. Historically GDP for saltwater fishing has accounted for just over half, (56 per cent in 2011), of the total sport fishery's GDP.

Ministry Resources

This sector was eligible for provincial programs which were open to all sectors, such as the Buy Local program. Under Growing Forward 2, seafood associations and seafood processors will be able to access marketing programs, but fishers will not.

Full Time Equivalent's	0.1 Policy Analyst
Notable program funds	N/A
Business Risk Management	Not eligible

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BC has relatively healthy fish populations and pristine un-crowded fishing areas.
- Close to the United States market and cost effect to travel to by air or vehicle.
- There are a variety of experiences from world class lodges to urban centers.
- The sector has strong community involvement through advisory board process, volunteers for habitat and enhancement efforts.

Weaknesses

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- Inadequate catch monitoring and lack of stock assessment for some species.
- Some uncertainty tied to First Nations treaty settlements regarding fish allocations.
- Poor market and economic data on angling and importance of angling to tourism mix.

Opportunities

- Improved DFO commitment.
- Improved catch monitoring.
- Enhancement of stocks and application of selective put and take fisheries such as chinook net pens.
- Regular reporting of economic dimensions and importance of the industry.

Threats

- Oceanographic and climate changes, pollution and urban encroachment.
- First Nations treaty settlements regarding fish allocations and associated uncertainty.
- Strong Canadian dollar may deflect US tourists to Alaska.

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- Restricted angling opportunities due to *Species at Risk Act* listings and protected areas.
- Allocation issues, particularly for halibut.
- Failure to cultivate next generation of anglers.

Areas of focus for 2013

- Sport fishery allocations, in particular halibut.
- Engage in sport fish enhancement efforts such as put and take fisheries – chinook net pens.
- Catch monitoring programs.
- Economic reviews, statistics and marketing initiatives.

Representative Groups/Associations

- BC Certified Seed Potato Growers Association (BCCSPGA)
- BC Potato and Vegetable Growers Association (BCPVGA)/Potato Industry Development Committee
- Canada Food Inspection Agency (CFIA), Seed Potato Certification Section, www.inspection.gc.ca/plants/potatoes/eng/1299171929218/1299172039964
- BC Fresh Inc. <http://www.bcfreshvegetables.com/bcfresh/home>

Industry Description

- BC is relatively small in relation to competing seed potato areas with 445.3 ha of certified seed potatoes grown by approximately 20 growers, producing approximately 30 different varieties. Seed potatoes are marketed mainly to the prairies and the United States (US)-
- Historically, the BC seed potato industry has been the Canadian leader in the development of the virus-free program and establishment of tissue culture facilities. The production of certified potato seed is a lengthy process which starts from sprouts harvested from disease-free parent tubers and results, finally, in the production of 7th generation certified seed.
- Each successful generation of seed passes rigorous inspection for varietal purity and the absence of certain diseases in order to advance on to the next class. The CFIA works closely with growers to ensure that seed potatoes meet certification standards.
- North American efforts to control the supply of commercial potatoes have limited the growth in market share for BC seed potatoes. The financial success of a season hinges more and more on maintaining the past year's pricing.
- The BCPVGA is concerned about the ongoing depletion of the potato trust fund in the near future. In anticipation of the new Growing Forward II agreement, seed producers set strategic goals, and identified priorities and opportunities for projects.
- Pemberton Seed Potato Growers Association is a sub-group of BCCSPGA who manage the tissue culture lab and raises nuclear stock from tissue cuttings.

Statistics

- Nationally, approximately 9 million centiweight (100 pounds) of seed potatoes are produced annually with a farm gate value over \$150 million.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents

0.10 Industry Specialist, plus additional support across the ministry e.g. plant health staff.

Notable program funds

Buy Local Program: \$100,000

Business Risk Management
(BRM) funds* (2010-2012)

**Seed potatoes are included
with potatoes for BRM
purposes.*

Potato sector funds:

AgriStability: \$8.8 million

Production Insurance (federal and provincial): \$3.2million

AgriInvest: (2008 – 2011) \$0.4 million

Markets

- BC seed potato exports represent \$7.7 million in annual sales.
- Progress has been slow in establishing new markets in Mexico due to paperwork complexities and regulatory requirements.
- The federal soil-testing program for Potato Cyst Nematode (PCN) and Golden Nematode is required for certified seed potato growers who are exporting.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BCCSPGA provides strong leadership and has a good working relationship with the regulatory agency, CFIA, with respect to inspection issues and procedures.
- The BCCSPGA and BCPVGA work together on common issues. Many seed potato growers are also commercial growers and have many other rotational crops in common.
- CFIA carries out a quality assurance program which provides audit documentation for seed that goes to the commercial grower. Uptake by BC growers has been slow.
- BCPVGA places significant importance on the annual BC Potato Variety Trial project which tests new varieties and obtains feedback throughout the value chain at the planning and wrap-up stages on varieties of interest. This project is gaining recognition in other seed production areas.
- Seed growing areas across North America are starting to share information regarding supplies, quality and pricing in order to deal with price undercutting and achieve increased stability in the market. The US started to participate in 2009.
- A National On-Farm Biosecurity package has been developed by the Canadian Horticulture Council which includes a standard for biosecurity and communication materials.

Weaknesses

- The sector is dependent on the vigor of the table potato industry in North America; oversupply in recent years has limited opportunities for growth and created a very competitive market.
- Lack of new entrants and progressive loss of seed potato growers is of concern to the industry. Two seed potato growing regions (Creston and Vancouver Island) have lost the last of their seed potato growers due to retirement.
- The sector would benefit from increased networking; representing BC on important issues, and sharing information with growers.

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Opportunities

- Maintenance of BC's reputation for production of quality seed requires resources to address pest, storage and quality issues in order to avoid damaging BC's good standing.
- There is a national research cluster for horticulture with a specific category related to potatoes which, if granted by Agriculture and AgriFood Canada, will be administered by the Canadian Horticulture Council (CHC). BC has appointed a Ministry of Agriculture staff person to represent BC on the Potato Research Committee. The committee has developed a National Research and Innovation Strategy for potatoes. The CHC – Potato Research Committee Working Group will play a strong role in the future in overseeing the coordination of research activities and continuing to monitor research needs.
- It is important for good communication to exist between BC Fresh Inc., BC's main potato marketing agency, and the Pemberton Seed Potato Growers Association and other BC potato growers (seed and commercial) on emerging trends. This can be a challenge as there is a tendency to not reveal too much publicly in order to maintain a marketing advantage.

Threats

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- PCN (and the related Golden Nematode) remains a threat to BC potatoes due to recent PCN findings in Canada and the US.

Areas of focus for 2013

- Industry is pressuring CFIA to negotiate with USDA find a way to decrease costs of the PCN soil testing program.
- Work on the National Research and Innovation Strategy for potatoes through the national research cluster for horticulture.

Representative Groups/Associations

- BC Shellfish Growers Association, www.bcsgea.ca
- Aboriginal Aquaculture Association, www.aboriginalaquaculture.com

Industry Description

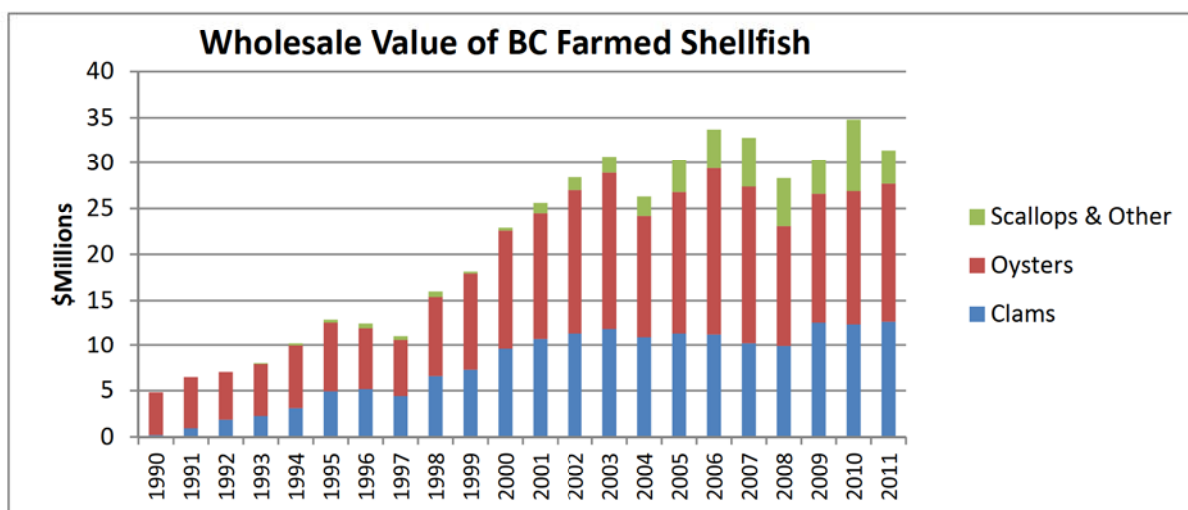
- Primary species include oysters, clams, scallops and mussels. Emerging species include cockles, geoduck clams, sea cucumbers and sea urchins.
- There are 315 companies. The sector is very diverse and is mostly made up of traditional family operations with a few large operators, some of which have processing facilities.
- There is a large dependence on imported seed stock. Grow-out systems vary with species from planting seed on beaches, to the use of suspended long-lines, tubes, and rafts.

First Nations

- First Nations are actively involved in the shellfish aquaculture industry; much more so than for finfish.

Statistics

- There are currently 515 shellfish tenures. The average size of a shellfish lease is 7.699 hectares (ha), giving an estimated total lease allocation of 3958.9 ha, or >0.1 per cent of available coast water within 1km or shoreline.
- In 2011 the cultured shellfish harvest landed value of \$19.6 M (wholesale value \$31.4M) represented 2 per cent of the total landed value of BC seafood products.



- 2011 landed value represents an 11 per cent decrease from 2010. There has been little growth in the industry since about 2003.
- Direct employment in the shellfish sector is estimated at 1,000 Full Time Equivalents (FTE), which are mostly in rural coastal communities.

Ministry Resources

Under Growing Forward 2, seafood associations and seafood processors will be able to access marketing programs, although fishers will not.

FTE's	0.15 Industry Specialist
Notable Program Funding	Accessed over \$35,000 through the provincial Buy Local program.
Business Risk Management Funds	Not eligible

Markets

- The top B.C. cultured shellfish export in 2012 was oysters at \$11.1million, a 22.6 per cent increase from 2011. The top markets were the United States (US), Singapore and Hong Kong. BC also exported \$8.1million in clams, a 23.1 per cent increase from 2011.
- Participation in international tradeshow is very important for BC's seafood industry, as the majority of production is exported and a large proportion of sales are derived from these market development activities.
- BC seafood is served in approximately two billion meals annually in more than 70 different countries.

Strengths, Weaknesses, Opportunities and Threats

Strengths

- Excellent growing conditions, clean water and environment.
- Proximity to US and Asian markets.
- Strong market brand and demand for shellfish export products.
- Access to strong, well developed research and development resources locally.

Weaknesses

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- Very low capitalization and access to capital which inhibits industry growth.

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Opportunities

- Increased access to sites in the North Coast.
- New species such as geoduck and sea cucumber.
- Improved Crown Land Leasing terms; longer and/or more favorable terms.
- First Nations development opportunities.
- New Markets; domestic and Asia.

Threats

- Global competition and the small size of the industry.
- Global economic downturn at the same time as an increasing world supply.
- Ocean acidification is believed to be having a negative impact on seed supply.
- Lack of domestic seed supply and access.

Areas of focus for 2013

- Represent Provincial interests at the Federal level to reduce regulatory uncertainties.
- Work with other Ministries to address crown land uncertainties.
- Support initiatives that address local production cost to increase competitiveness.
- Support research and innovation commercialization funding initiatives.

Representative Groups/Associations

- BC Fruit Growers Association, www.bcfga.com
- Okanagan Kootenay Cherry Growers Association, www.bccherry.com
- New Tree Fruit Varieties Development Council, www.ambrosiaapples.com
- BC Tree Fruit Cooperative, www.oktreefruit.com

Industry Description

- The BC tree fruit industry has about 400 commercial growers, who farm about 15,000 acres of apples, pears, cherries, peaches, nectarines, apricots and plums.
- The industry is located in the Okanagan Valley from Salmon Arm in the north to Osoyoos in the south, the Similkameen Valley to the west and the Creston Valley in the Kootenays to the east. Tree fruits are also produced in the Fraser Valley and on the Gulf Islands on a much smaller scale.
- Grower returns for apples were \$34 million. Apples are the dominant crop by acres planted (8844 acres, 60 per cent of the total acreage) and pounds of fruit produced (213 million pounds or 83 per cent of the total fruit crop).
- Cherries have a much smaller acreage (3690 acres or 25 per cent of the total acreage), but sometimes exceed the value of apples with \$31 million in grower returns.
- Okanagan Tree Fruit Cooperative packs and sells about 72 per cent of the industry's apple crop, but only about 30 per cent of the soft fruits. The remaining fruit is packed by approximately 29 private packing organizations.
- Only 75 per cent of the apples produced in BC are sold within Western Canada. BC satisfies about 45 per cent of Western Canada's apple demand. The rest of the Western Canadian market is met by imports, predominantly from Washington State.
- BC has a negative trade balance with the US in apples and in tree fruits overall.
- The tree fruit market is increasingly difficult as a result of fewer buyers and more bargain-oriented consumers.
- Washington State is a formidable competitor as a result of their large size, and very competitive fruit.
- The majority of the production area is located in the Okanagan (90 per cent), followed by the Vancouver Island (4 per cent) and Kootenay (4 per cent) regions and the Lower Mainland (2 per cent).

Statistics

- BC's tree fruit industry generated farm gate sales of \$75 million in 2011, accounting for 33 per cent of the total value of tree fruits produced in Canada.
- The industry produced 117,000 tonnes of fruit on 15,000 acres in 2011.

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full Time Equivalents	.06 Industry Specialist 0.6 Plant Pathologist, Plant Health Unit 0.6 Entomologist 0.2 Resource Stewardship Agrologist Plus additional program support for food safety, innovation etc.,
Notable Program Funds	Buy Local Program: \$95,000 Replant Program: \$2 million AgriFlex: \$2 million (Provincial contribution; 2010-2014) School Fruit and Vegetable Program: Government has provided over \$26 million since 2005
Business Risk Management funds (2010-2012)	AgriStability: \$4.6 million Production Insurance: \$19.6 million (Federal & Provincial) AgriInsurance: (2008 – 2011): \$2.2 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- BC producers have very good access to new varieties through the Okanagan Plant Improvement Corporation and the apple and cherry breeding program at Summerland.
- Western Canadian consumers provide strong consumer support by buying locally produced fruit.
- The sector is represented by several strong organizations: BC Fruit Growers' Association, Okanagan Kootenay Cherry Growers' Association and the new Tree Fruit Varieties Development Council.
- Strong competition from nearby Washington State which has lower labour costs; higher packing house productivity; superior grade and yields; better economy of scale and cost associated with larger orchards; and more.
- An independent comparison of Washington State and BC industries provided recommendations on how to address key profitability issues.

Weaknesses

- The apple sector does not have a complete market strategy and funding to implement strategy.
- Acreage of apples is shrinking as they are being replaced with grapes, cherries and other

non-farm uses.

- Average apple returns have been low but vary considerably by variety, although this is improving. Expected grower returns may approach cash costs of production in 2012.
- Growers are responding by selling fruit privately at harvest that competes with the fruit that they ship to the packinghouse. The cooperative has been trying to respond to the situation, and are now focusing on a more targeted response.
- Some apple varieties such as Red Delicious, Golden Delicious and to some extent McIntosh and Spartan tend to achieve low returns to growers. Replanting to higher value varieties such as Ambrosia, new varieties from the Summerland research breeding program and others will improve average returns

Opportunities

- Industry is accessing the Agriflexibility Tree Fruit Market and Infrastructure Innovation Initiative. Notable projects include new technology in storage facilities. About \$400,000 remains and the initiative finishes in March 2014.
- Funding to make the changes needed to capitalise on the demand for locally grown product and recommendations from the comparison of Washington State and BC industries will be a challenge.
- Growers are promoting a long term replant program.
- The Sterile Insect Release program is an excellent control mechanism utilizing area wide control of codling moth. This technique could be used for other insects as well and potentially for new invasive ones such as apple maggot and brown marmorated stink bug

Threats

- Low priced and sometimes better quality fruit from the imports.
- The high Canadian dollar has an immediate and significant impact on the BC industry as we compete directly with the huge Washington State industry.
- Similarly the economic downturn has had an impact on new varieties and the organic part of the industry as consumers and wholesalers are looking for cheaper alternatives.
- Spotted wing drosophila is developing into a manageable threat to the stone fruit industry.
- Some growers are beginning to ship apples to packers in Washington State and others to Ontario in 2013.

Markets

- BC's top tree fruit exports in 2012 included cherries (\$42.1 million), apples (\$16.9 million), apricots (\$1.5 million) and pears (\$0.04 million).
- The top markets for BC cherries in 2012 were Hong Kong, Taiwan, the United States, the Netherlands, the United Kingdom and Mexico. Canada is currently in negotiations with China to open market access for fresh BC cherries.

- To support industry's international market development efforts, the ministry commissioned a study through an international market intelligence provider in 2012 that analyzed opportunities for fresh cherries in China and Japan.

Area of Focus for 2013

- The industry is requesting a long-term replant program to replace the low return varieties
- The industry is requesting funding for research into area wide control programs for insects.

Representative Groups/Associations

- BC Grape Growers Association, www.grapegrowers.bc.ca
- BC Wine Institute, www.winebc.org
- BC Grape Wine Council, www.bcwgc.org
- Wine Island Growers Association, www.wiga.ca

Industry Description

- BC is home to 864 vineyards, including 242 licensed wineries.
- Over 60 different grape varieties are produced in the province, the top ten of which include Pinot Gris, Chardonnay, Gewurztraminer, Riesling, Sauvignon Blanc, Merlot, Pinot Noir, Cabernet Sauvignon, Syrah (Shiraz) and Cabernet Franc.
- The industry reports 10,000 acres of wine grapes and 200 acres of fresh market grapes.
- Growth has been rapid in recent years as tree fruit growers have converted to wine grapes from apples. The industry expansion is slowing as growers adjust to declining grape prices.
- The BC Vintner's Quality Alliance (VQA) system guarantees and ensures that qualifying wines meet technical specifications. It was originally an industry-operated system, but in 2005, after extensive industry consultations, the Province took over responsibility for administration under the Wines of Marked Quality Regulation. Although VQA wines fetch a higher market price, this market advantage has decreased since 2008.

Statistics

<i>Gross receipts</i>	2000	2011
BC Gross Domestic Product (GDP)	\$122 million	\$158 million
BC Wine Industry GDP	\$67 million	\$151 million
<i>Labour Force</i>	2000	2011
Number of Full-Time Equivalents (direct and indirect)	1,860	3,361

Ministry Resources

Provincial funds directly attributable to this sector are listed here (aside from production insurance). Federal funds that were leveraged as a result of provincial funds, or provincial staff contribution, are not included, nor are provincial programs that were accessed by multiple sectors.

Full-Time Equivalents	Staff support across BC Ministry of Agriculture (ministry) including grape industry specialist, policy analysts, agrologists, production insurance and agristability staff.
Notable Program Funds	Buy Local Program: \$200,000
Business Risk Management	Agristability: \$38,000
funds (2010-2012)	Production Insurance: (federal and provincial) \$1.4 million

Strengths, Weaknesses, Opportunities and Threats

Strengths

- The BC Wine Institute developed a Marketing, Communication and Advocacy Plan in 2012.
- The industry has been very successful in producing high quality wines.
- Wineries and growers receive higher prices than many other wine producing regions.
- Currently, the industry is developing sustainable certification programs for growers.
- The industry is well organized. The growers belong to the BC Grape Growers Association. The wineries are represented by the BC Wine Institute and the research and development levies are looked after by the BC Wine Grape Council.

Weaknesses

- Producers are aging and there is a shortage of trained viticulture workers.
- Many wineries have building inventories (older vintages) of wine. This oversupply could impact on BC grape pricing in 2013 and beyond.

Opportunities

- Chinese and South Asian interest in the industry has sparked some winery sales.
- Continued participation in Seasonal Agriculture Worker Program for labour.

Threats

- Rapid expansion of the industry has put some wineries on marginal lands leading to risk from winter injury and spring frosts.
- Lower cost imported wines are a substituted product for BC produced and cellared wines.

Markets

- Approximately 85 per cent of fresh grapes and wine are sold within BC.
- In 2012, B.C. exported \$7.7 million in wine, a 34 per cent increase from 2011. The top markets for these exports were China, Hong Kong, United States and Taiwan. Fresh grape wine accounted for \$5.2 million of these exports, while sparkling wine accounted for \$2.4 million.
- To support the development of international markets for BC wine, ministry staff conducted a study for the BC Wine Institute in 2013 to provide industry with information on emerging opportunities for BC wine products.
- Data is not available on inter-provincial trade of wine.

Areas of focus for 2013

- Encourage industry to participate in the ministry's suite of risk management programming.
- Work with industry on Buy Local initiatives.
- Encourage participation in environmental farm plan programming.

ROLLING KM – May 2013

My vision for AGRI

- I see an agriculture sector in British Columbia that builds on our diversity and strengths.
- One of our biggest strengths is the range of the trusted, high-quality food products B.C. offers consumers, locally and around the world.
- People want to feed their families healthy, nutritious foods, and B.C. is Canada's most diverse farming province, with more than 200 commodities produced on the land and about 100 species of fish, shellfish and plants harvested from the sea. There are opportunities for growth for each of them.
- Whether we are talking about Okanagan wine, coastal seafood, dairy or beef, grains from the Peace, blueberries from the valley or apples or tree fruit from Kelowna, my job as agriculture minister is to work with growers, ministry staff, my colleagues and other levels of government to create an operating environment in which they can succeed.
- B.C.'s food producers and processors form a sophisticated and high-tech industry that now generates \$10.9-billion in revenue a year and employs 61,000 British Columbians, and they deserve our support.
- I will work with industry to increase our focus on innovation and technology, and work with them to expand both their product line and their markets.
- The province recently finalized an agreement (Growing Forward 2) with the federal government resulting in about \$110 million of funding for B.C. farmers and food producers over five years. (2013-2018)
- The funding will support innovation programs that stimulate improved growing techniques and yields and emphasize projects that result in sector-wide benefits – to increase competitiveness, new markets, or production capacity across the sector.
- These programs offer each producer opportunities to enhance their operations and earn new dollars.
- Over 20,000 family farms provide healthy local food to B.C. families. The Agrifoods sector provides stable jobs and revenue, and supports strong and diversified communities.
- We need to support B.C. producers, not only for the fresh and healthy foods they provide us, but because the agrifoods industry is a job-creator and an integral part of B.C.'s economy.
- The B.C. government is focused on building on the \$10.9 billion in revenue B.C. producers and processors generate a year, and the \$2.5 billion worth of agri-food products we export to more than 135 countries.

Budget 2013 Support for Agriculture

- Despite the challenging economic times we find ourselves in, Budget 2013 reaffirms our government support for British Columbia's agriculture sector.
- The ministry's 2013/14 operating budget is \$79.3 million - an increase of about 20% or \$13.5 million from 2012/13

Carbon Tax:

- Budget 2013 provides \$20 million over three years for a carbon tax relief grant to help offset carbon tax costs for commercial greenhouse vegetable and flower growers.
- The new funding in budget 2013 follows the temporary funding of \$7.6 million the province provided in 2012 to assist the greenhouse sector.
- The grant announced in Budget 2013 is available for the 2013 and future years, and will be set at 80 per cent of the carbon tax paid on specified fuels.
- The Province supports British Columbia's diverse agriculture sectors in different ways. This action provides relief to our greenhouse and floriculture growers, who employ about 5,500 British Columbians.
- For example we've provided \$212 million to the cattle and ranching sector since 2001, and more than \$130 million to support tree fruit growers since 2000.
- B.C. vegetable greenhouse growers have invested heavily in technology and jobs in B.C. Their sales reached a record \$290 million in 2011, and we want to support and sustain that growth.
- Though B.C.'s vegetable greenhouse growers are international leaders in yield production and innovation, the competition in the greenhouse sector is fierce.
- B.C. growers have been at a competitive disadvantage because they compete with U.S. and Mexican greenhouse operators which are not subject to a carbon tax. The continuation of the rebate allows the B.C. industry to keep their competitive edge.
- Providing the sector with carbon tax relief is one of 49 actions in the BC Agrifoods Strategy that will help lead our agrifoods sector to becoming a \$14-billion-a-year industry by 2017.

In addition:

- Government intends to introduce legislation this fall to provide a carbon tax exemption for farmers for the same coloured motor fuels, and uses, they are currently able to purchase exempt from motor fuel tax.
- This means that farmers will be exempt from carbon tax on the purchase of coloured motor fuel for use in on-farm equipment such as tractors and fuel used on-highway in eligible farm vehicles.
- This is something producers raised, we listened, and we acted.
- These measures will provide a combined benefit of about \$11 million annually.

Agriculture Land Commission - Budget

- Budget 2013 also includes an additional \$930,000 to further strengthen the Agricultural Land Commission (ALC). This year the Province will provide the ALC with almost \$3 million in annual operating funding.
- The budget increase will enable the ALC to:
 - continue with East Kootenay boundary review and undertake other targeted reviews (6 to 10 years to complete all reviews);
 - increase compliance and enforcement activities throughout the province and to build partnerships with local governments and provincial ministries;
 - pursue more proactive planning work with local governments;

- work more closely with farmers, ranchers and agricultural organizations to preserve agricultural land and encourage farming; and
- continue digital conversion and mapping projects started with transitional funding, improving ability to evaluate the collective impacts of decisions on applications.
- The new funding in this year's budget is in addition to one-time funding of \$1.6 million the province provided in 2011, as a part of a package that increased enforcement
- In order for agriculture to continue to succeed in British Columbia, producers will need a sustainable landbase. The B.C. government has committed to help the ALC become a stronger organization, and transition to a more self-supporting operating model.

ALC General

- We are working with local governments, producers and associations so neighbours understand and value the benefits farming brings to their communities, and to be aware of the farming lifestyle and activities before they move into an agricultural area.
- One of the main commitments in our Agrifoods Strategy is to provide a sustainable land base for production.
- In November 2011, the Province strengthened the ALC with new legislation and \$1.6 million in additional funding. The changes strengthened the ALC by giving it greater ability to focus on preserving farmland, increasing enforcement and to evolve into a sustainable organization.
- In addition to the funding, the Province also increased the number of provincial government officials authorized to investigate and respond to ALR violations to approximately 30 through coordinated multi-ministry enforcement and further expands enforcement by allowing qualified officials of other agencies and local government bylaw officers to conduct enforcement activities.
- Other areas in which the ALC was strengthened include:
 - Preserving farmland by permitting the ALC to dismiss unchanged repeat applications that have been denied within a five year period;
 - Sustainable operations through \$1.6 million in additional funding and provisions for increased revenue generation by the ALC;
 - Strategic governance provisions give the Chair additional oversight over regional panels and more time to focus on Commission matters by hiring a CEO to look after administrative issues;
 - Encouraging farming by working more proactively with local governments rather than simply reacting to applications.

ALC – fill dumping

- The Agriculture Land Commission (ALC) has an application and permitting process for any fill to be placed on land that is within the Agricultural Land Reserve (ALR). They also have clear regulations on what material is accepted and what is not.
- The ALC is an administrative tribunal – arm's length from government - and government does not interfere in their independent decision-making process.

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- In addition to the funding, the Province also increased the number of provincial government officials authorized to investigate and respond to ALR violations to approximately 30. We further expanded enforcement by allowing qualified officials of other agencies and local government bylaw officers to conduct enforcement activities.

Initiatives I support

Buy local campaign

- The B.C. government is committed to promoting local foods.
- We have worked with producers and communities over the last 10 years to ensure British Columbians recognize the economic, environmental and health benefits of buying local and we've succeeded.
- Buying local is now mainstream thinking.
- The passion for local foods has never been stronger.
- More and more, across the province, new entrepreneurs are starting their food businesses.
- 20 years ago, the Okanagan was not an area renowned for wines internationally. Today, people come here for the scenery, the warmth in summer, the ski hills in winter, and to see and enjoy the wines produced here.
- We are a world leader in growing blueberries and cranberries – two products that for growing health benefits, people only want to consume more of.
- We have more people investing in artisan products than ever before. From award-winning cheese makers, to soy-based meat substitutes that make appearances on Oprah Winfrey (Gardein foods), as well as all the Asian, Mexican, European specialties produced in the lower mainland. The passion for new agrifoods businesses in B.C. is at an all time high.
- To build on that momentum, the B.C. government announced \$2 million in funding to provide businesses and organizations to launch or expand their own marketing campaigns.
- About a dozen projects have been announced so far, supporting B.C.'s shellfish, apple, wine, poultry, potato and organic sectors.
- The funding promotes B.C.'s diverse agrifoods industry, and allows each applicant the freedom and expertise to market their product as they best.
- This is an example of government and the agrifoods industry working together, to promote local foods, and generate economic benefits for B.C.'s food producers and communities.
- People come to B.C. with ideas because it is a place an idea can become a business.
- Food producers are attracted by the climate, and the quality ingredients produced here.

Meat Inspection System

- In March 2013, the Province announced its new meat inspection system.

- Consumer safety is paramount. British Columbians can be confident that their provincial meat inspection system will continue to support the highest standards of food safety, and support consumer and retail confidence in BC meat.
- The Province consulted with communities, producers, health agencies and ranchers extensively and recognized a continuation of the traditional system maintaining third party government inspection is the best choice.
- B.C.'s Provincial Health Officer, the B.C. Cattlemen's Association, the BC Abattoirs Association, the BC Food Processors Association all endorse the system. We took the time to do it right.
- The system protects public health, supports local farmers, and promotes jobs.
- Since the 1980s, the province has contracted with the Canadian Food Inspection Agency to provide meat inspection services at provincially licensed slaughter plants.
- However, between now and the end of 2013 the CFIA will transition out of this role in the three provinces that used CFIA to deliver provincial meat inspection services – B.C., Saskatchewan and Manitoba.
- All other provinces across Canada already deliver their own provincial meat inspection systems.
- In B.C., a provincial steering committee worked with industry and stakeholders, and public health and meat inspection system experts for over a year on the review of provincial meat inspection services, so that the Province is well prepared to take over this role.

Class E License Pilot Project

- During our ongoing consultation with communities and residents in the North Okanagan, it became clear they felt their needs were not being met by the existing graduated licensing system and that all parties were committed to working together to explore options.
- A pilot project offering residents of the Regional District of North Okanagan up to five new Class E Licenses will support increased access to local meat in the region.
- These pilot licences will be available to operators within a two hour travel distance of a provincially licensed abattoir.
- Applications for the five new class E licences will require the adoption of a new Code of Practice, training in humane slaughter best practices and participating in an evaluation.
- The development of the code of practice and expanded training is underway with the intent of having the pilot project licenses issued in time for the fall.

Mobile Abattoir Project

- Through our extensive consultation process we recognized the South Cariboo has unique challenges that have not been accommodated through the existing programs and that all parties were committed to working together to explore options.
- As a result, a mobile abattoir will be stationed in 100 Mile House for the fall slaughter season.

- Once the mobile abattoir is fully implemented in 100 Mile House, the Ministry will consider if there are other communities that meet the same criteria, and for which a mobile abattoir would be an appropriate response.
- Ministry staff will work with 100 Mile House (and if appropriate, other interested communities) throughout the process.
- Communities will be responsible for documenting the need and financial viability of a mobile abattoir's operation in their area, to fund a docking station that meets provincial licensing requirements and to commit to meeting and maintaining provincial standards.

Agrifoods strategy

- The B.C. Agrifoods: A Strategy for Growth is part of the BC Jobs Plan and was launched in March 2012.
- It is posted at <http://www.gov.bc.ca/agri/agrifoodsstrategy.html>
- The strategy builds on the growing trading relationship B.C. has established with existing partners as well as expanding those with emerging markets, and sets to grow the industry in B.C. from \$10.5 billion when we started to \$14 billion-a-year by 2017.
- The Strategy emphasizes our commitment to:
 - Expand the opportunities for B.C.'s agriculture and seafood producers in new markets in Canada and overseas.
 - Invest so B.C. continues to have, and be internationally recognized for our safe and secure food supply.
 - Secure a strong future for farming, and provide a sustainable base for food production in B.C.
 - So the farmers and families who grow our food will continue to share their passion and knowledge with the next generation.
- Our role as government is to create an environment in British Columbia where agrifoods producers succeed.

BC growers fitting into world stage

- B.C. exported \$2.5 billion of food to more than 135 countries a year, with over \$1.5 billion typically exported to the U.S.A.
- As Canada's Pacific Gateway, B.C. is the closest connection Asian markets have to North America, and our ports deliver hundreds of millions of dollars worth of B.C. food products each year to customers in China and Japan. The opportunities for growth are huge.
- Government's efforts to build exports to China are working. The Province has led several trade missions to China promoting B.C. agriculture and seafood products as well as operating trade offices there
- The missions and office have helped achieve record setting exports to China in both 2010 (\$118 million) and 2011 (\$148 million) overall, and of seafood (\$109) million in 2011, and wine (\$4.6 million).
- About half of all B.C. livestock and poultry product exports are to Asia, with 40% exported to the U.S.A.

- Japan is the biggest of 23 export markets for B.C. pork, and the Philippines is the biggest importer of B.C. chicken.
- B.C. wine exports have skyrocketed since 2008, from \$1.4 to \$5.5 million, due to rapidly increasing demand for high quality wine in Asia.
- Other niche markets for B.C. food include Egypt, Iran, Madagascar, Peru, Russia, Singapore and the UAE – where we export everything from seafood products, to baking ingredients, to fruits and grains.
- The scope of B.C. food producers marketplace is truly remarkable. French Polynesia, for example was B.C.'s fifth largest export market for fruit and vegetable juice recently (2010) with sales of \$300,000.
- To put that in perspective, the largest market was the U.S.A. with sales of \$43.5 million, but it still speaks to opportunities and building new markets for B.C. products.

Key AGRI legislation

- Government is always looking at ways to support farmers in B.C.
- In June 2012 for example, the B.C. government
 1. Increased the tax exemption limit on farm outbuilding improvements,
 2. extended farmer's dwelling and home site farm classification to retired farmers in the Agricultural Land Reserve (ALR) for farms that stay in production,
 3. reduced the administrative paperwork for farmers by changing the farm income reporting period to be consistent with each farmer's Canada Revenue Agency income tax reporting period
 4. Provided more flexibility in meeting the requirements to maintain farm status by expanding the list of qualifying agricultural products to include
 - Broad leaf maple and birch sap or syrup.
 - Breeding products (i.e., livestock semen, ova and embryos produced as part of livestock raising).
 - Horse stud services provided as part of horse rearing.
- In addition to the legislation governing the Agricultural Land Reserve, the province also has the Farm Practices Protection Act also known as the Right to Farm Act (April 1996)
- The act essentially gives farmers the right to farm in the Agricultural Land Reserve and on land zoned for farm use, or in areas licensed for aquaculture.
- When farmers operate under normal farm practices, the act protects them from nuisance actions, court injunctions or specific nuisance bylaws related to the operation of the farm.
- The Farm Practices Board, now called the Farm Industry Review Board, was also established under this act.
- The board hears complaints from individuals aggrieved by odour, noise, dust or other disturbances resulting from farm operations.
- The Ministry of Agriculture may also work with persons about a farm practice in an attempt to resolve the concern before the complaint reaches the board.

Province's role in Agriculture

- All levels of government work together to support British Columbia farmers.
- The BC Government will continue to support the industry as it plays its part in generating new jobs, stimulating investment and inciting growth across the province.
- The B.C. Ministry of Agriculture has an important role in working with farmers, producers and other ministries in promoting the consumption of local food, and in creating a business environment for B.C. farmers to succeed.
- The ministry has a number of staff with a wide range of experience specific to B.C. crops including berries, grapes and seafood.
- There are sector (berry, beef, dairy, greenhouse etc) specialists, agrologists who are experts on producing food in a specific region of the province, a seafood division that works to promote our sustainable fisheries and aquaculture producers, and many more who offer different services and support to B.C.s agriculture sector.
- We will ensure B.C. voices are heard in Ottawa. In fact, the Government of British Columbia has worked tirelessly since 2001 to ensure our province's agricultural families receive the best possible deal in funding from the federal government through the growing forward program.

Growing Forward 2

- The Government of British Columbia has worked tirelessly since 2001 to ensure the voices of B.C. producers are heard in Ottawa, and that B.C.'s agricultural families receive the best possible deal from the federal government.
- Budget 2013 builds on our successful partnership with the federal government, with whom the provinces and territories reached a multi-lateral agreement on a second Growing Forward agreement.
- This new agreement will deliver programs from 2013-2018 and like the one before it, provide both risk management and business development programs to producers and processors across our agrifoods sector.
- We worked closely with our own industry stakeholders as well as our provincial and federal partners throughout GF2 negotiations. In fact we brought proposals to the table that reflected the wishes of B.C. producers, while respecting the fiscal realities of the federal government. The final GF2 agreement reflects my ministry's hard work.
- Funding support for strategic initiatives will increase in GF2, with the goal to increase overall prosperity for agriculture industries. There is a strategic shift to emphasize our support for programs that can result in sector-wide benefits – to increase their competitiveness, develop new markets, or expand production capacity.
- One of the key points in the B.C. Jobs Plan's Agrifoods Strategy is how innovation, and improved competitiveness will lead the sector to becoming a \$14 billion a year industry, and create new opportunities for more British Columbians to join the 61,300 it currently employs.

Other examples of Innovation the ministry has supported

- The Ministry of Agriculture in partnership with the Investment Agriculture Foundation and Agriculture and Agrifood Canada will contribute up to \$1.5 million toward 29 new projects to help the BC agri-food industry seize opportunities and explore innovative ideas.

- We are committed to investing in projects that will contribute to the long-term growth and sustainability of the sector as a whole. A few examples that demonstrate the diversity of projects we fund and the ideas we believe will carry B.C.'s agriculture industry forward are:
 - NuWave Research (\$120,337; complete Feb 28, 2013): Demonstration and feasibility of a mobile continuous vacuum microwave drying process with a commercial raspberry crop.
 - Summerhill Estate Winery (\$81,069; complete Mar 30, 2013): Controlled atmosphere in wine processing to reduce use of sulphur dioxide and increase quality and shelf-life.
 - SemioBIO Technologies (\$140,000; complete Dec 31, 2012): New application technology for mating disruption of pests in BC orchards.
 - Vitalus Nutrition (\$25,000; complete Mar 30, 2012): Develop technology to produce low lactose milk protein concentrate to replace standard dairy ingredients in a wide variety of foods – something the lactose intolerant community would appreciate.
 - Kwantlen College (\$165,000; complete Feb 16, 2013): Develop molecular tools and production technologies to provide alternatives to pesticides and contribute to environmental sustainability.
- With partial funding provided through our innovative Clean Energy Fund, Sun Select Produce Inc. developed a proprietary carbon capture system that is used in their Delta greenhouses to reduce energy costs. The Ministry of Agriculture is also working with stakeholders to promote further innovation in greenhouse heating technology and leading an export analysis study to identify new markets for B.C. greenhouse products.
- The B.C. Cranberry Marketing Commission is conducting research to select the most promising new cranberry varieties for B.C. conditions. Much of this research will be conducted at the newly established Cranberry Research Centre in Delta.
- The Province is working hard to provide B.C. farmers with the resources they need to be successful and competitive in today's global marketplace. This spring, we launched www.agrifoodBC.ca to allow producers access to industry-specific information and business risk management tools.
- We recently announced a new \$213,000 job training program that will prepare 120 British Columbians for a career in food processing, and the opportunity to join the more than 61,000 British Columbians already working in B.C.'s agrifoods sector.

Supply Management

- The B.C. government has worked with federal and provincial counterparts to expand market opportunities and jointly reiterate our support for liberalized trade arrangements.
- We see the opportunities new trading blocs and agreements present to farming and food producing families but recognize all negotiations should clearly maintain our support for Canada's supply management system

Biggest challenges for Agriculture

- Export based food producers such as seafood processors are affected by world economies and experience stronger sales when their market countries are doing well.

- That's why the B.C. government has worked so hard to expand our export markets, for food and all products. B.C.'s agrifoods industry will be more viable if it has multiple key markets.
- In addition to the traditional trading partners of the USA, Japan and the UK, the B.C. government has established growing trade relationships with China, Russia, India and countries around the world.
- Most of the fertile land in BC is in the same area where most of us live – the Lower Mainland and Okanagan.
- We are working with local governments, producers and associations so neighbours understand and value the benefits farming brings to their communities, and to be aware of the farming lifestyle and activities before they move into an agricultural area.

Support for Tree Fruit Sector

- The B.C. government is committed to working with industry to develop a regular, annual, sustainable, bankable, reliable, replant program.
- In January, Minister Letnick announced the B.C. government is expanding the scope of our \$2-million replant to allow growers to replant with different types of fruit trees. The expanded scope offers further help to B.C. tree fruit growers to increase competitiveness and profitability.
- The objective is still the same – to promote the growth and production of high-value, high-quality B.C. fruit, and to develop a stronger, more sustainable tree fruit sector that results in growers earning more dollars.
- The replant program is in addition to the \$5 million federal-provincial Tree Fruit Marketing and Infrastructure Innovation Initiative. Deliverables from that program include the \$2.7-million modernization of the Okanagan Tree Fruit Cooperative packinghouse.
- Over the last dozen years B.C. tree fruit growers received more than \$120 million from the provincial and federal governments in response to weather-related losses and income stability programs, and more than \$30 million in other funding.

Support for the Ranching Sector

- The Ministry of Agriculture has provided \$212 million to cattle ranchers between 2001 and 2011 (\$115 million since 06) through Provincial and Federal programs, including \$180 million (\$95 million since 06) through the Business Risk Management Branch and \$32 million (\$20 million since 06) in programs that develop market opportunities, and invest in research and management practices. Some programs include:
 - \$5 million (2010/2012) Fed-Prov (60-40) Canada British Columbia Ranching Task Force Funding Initiative for programs supporting access to emerging markets; producer education to meet consumer demands; product development and branding; and education to increase domestic demand, including the Behind the Beef campaign.
 - \$7.3 million (2006/2008) for the Meat Transition Assistance Program to help upgrade or build abattoirs to comply with new meat inspection regulations.
 - \$3 million (2008) Age Verification Program that enabled industry to reach markets with imposed age limits. (Many countries only allow imports of beef under thirty months as a precaution to BSE/ mad cow disease).

- \$5 million (2005) Livestock Tissue Initiative to help industry manage abattoir waste
- The Ministry of Transportation has invested \$19 million to construct almost 1,300 km of fencing to guard provincial highways and railways from straying cattle. The program is administered by the B.C. Cattlemen's Association. This includes:
 - \$10 million to construct 700 km of fencing between 2011 and 2015, with about 100 kilometres of fencing constructed in 2011.
 - \$9 million to construct 588 km of fencing between 2004 and 2007.

Aquaculture General

- The B.C. Government is committed to the socially and ecologically responsible management of B.C. fisheries, including an environmentally and economically sustainable aquaculture industry for the benefit of all British Columbians.
- B.C. seafood is respected and desired worldwide as great tasting and sustainably harvested. It is served in more than two billion meals worldwide every year.
- 6,000 British Columbians work in aquaculture, earning more than \$224 million a year.
- Over half the British Columbians working in aquaculture are women and/or First Nations.
- Aquaculture is constantly evolving in British Columbia, with pilot projects developing new species like sablefish and white sturgeon, and renewable energy at shellfish operations.
- B.C. works with the federal government and industry to be prepared for possible disease outbreaks, and to ensure the prompt and coordinated implementation of the science-based response that the federal government and salmon farmers have developed.

Closed Containment:

- There are a number of BC success stories with closed containment systems that include sturgeon (to produce meat and caviar), tilapia (fresh fish market), sablefish (fingerlings) and commercial salmon hatcheries that support marine net-pens. While this technology is becoming more popular in BC, economic viability remains a real challenge for many applications.
- The B.C. government encourages innovation across agriculture and seafood, and that includes trying and evaluating new technology.
- Given the recent surge of interest in closed-containment and advancement in the technology used, it is critical to for government and industry to work together to capitalise on the benefits the new technology can provide.
- Government supports the evaluation and use of new technologies like closed containment to explore new markets and build on B.C.'s reputation as a provider great-tasting, sustainable seafood.

Use of Propane Cannons

- The ministry continues to assist local governments in regulating the use of propane cannons in their communities.
 - The Ministry has a model noise bylaw which local governments can easily incorporate into their by-laws.

- Ministry staff are also available to address individual complaints.
- People aggrieved by a noise or other disturbance resulting from a farm practice may also file a formal complaint with the BC Farm Industry Relations Board.
- I know that blueberry farmers are aware of the problems caused by propane cannons and have made a sincere effort to make changes to their practices and be good neighbours.
- The BC Blueberry Council has also been very effective in responding to noise complaints from propane cannons.
- In addressing these issues, there needs to be a balance between farming and non-farming interests while recognizing that the ALR is an area where the priority use is farming and non-farming activities are controlled. Key to this balance is neighbours respecting their neighbours.

GMO crops – Arctic Apple

- The Okanagan tree fruit industry is a vital part of our food system and a part of B.C.'s heritage that all British Columbians are proud of, and something this government has supported by investing millions of dollars to improve competitiveness and profitability.
- Approval for plants with novel traits rests under federal jurisdiction, and I have shared the concerns of the tree fruit industry with the federal minister's office.
- I will continue to focus my energy on programs that B.C. has control of and help growers take advantage of the market demand for high-value products. Our \$2 million replant program supports the production of premium B.C. fruits, and our partnership with the federal government has led to \$5 million in modernization of packaging houses and other innovation projects that help fruit growers earn more dollars.

Reports of Animal Cruelty (SCPA enforces legislation)

- The Government expects all British Columbians to treat animals with respect and due care.
- The B.C. Government amended the Prevention to Cruelty against Animals Act (PCA) to have the toughest penalties in Canada. (The Government issued a news release when the amendments were introduced in May 2011, and when they became law in June 2011)
- The maximum penalties that can be levied against a person who is convicted of causing distress to an animal is \$75,000 and up to 24 months imprisonment.
- Judges have these options available in determining sentences.
- Since June 2011, B.C.'s Crown Counsel have been building on the expertise within the Ministry of Justice to successfully prosecute cases of animal abuse.

ISSUE NOTE

Issue:

- A small group of predominantly commercial beekeepers of BC and Prairie provinces are lobbying provincial and federal governments to support the cancellation of the 26-year import ban of packaged bees from the contiguous United States.

Background:

- After the initial discovery of the Varroa mite in the U.S.A. in 1987, the Canadian government imposed an import ban of packaged honey bees to protect Canadian honey bee colonies from Varroa and other exotic bee pathogens. The import ban has remained in place ever since.
- The import ban of packaged bees from the U.S.A. has been the most polarizing issue ever faced by the Canadian beekeeping industry.
- While the Varroa mite subsequently spread into Canada to become the most destructive of all pathogens, threats of other exotic pests including the Africanized Honey Bees (AHB), Small Hive Beetle and Amitraz-resistant Varroa justified the continuation of the import ban.
- The import ban necessitated the Canadian commercial beekeeping sector to adopt major operational changes towards greater self-reliance that included significant investment in overwintering facilities and equipment. Greater self-reliance also facilitated the development of a BC-based bee breeding industry.
- In response to the proposal of lifting the import ban, the Canadian Food Inspection Agency (CFIA) has initiated a risk assessment which would apply to the 2014-onward seasons.
- In BC, the issue of “border closure” is strongly divided with the majority of small-time beekeepers opposed to opening the border versus the minority of semi- and fully commercial minority in favour of lifting the import ban.

Decision required:

s.13, s.16

Contact: Paul van Westendorp, Apiculture Specialist, 604-556-3129 / 604-943-3600

ISSUE NOTE

Issue:

- Growing Forward 2 Designated Programs Administration and Adherence to Government Procurement Policies

Background:

- The Growing Forward 2 (GF2) Bilateral Agreement was signed with the federal government on March 26, 2013. The budget for GF2 Designated Programs over the five-year agreement term is \$105M (\$59M federal; \$46M provincial).
 - GF2 has 12 programs divided between three program areas – Innovation; Competitiveness & Market Development; and, Adaptability & Industry Capacity.
- In fall/winter 2012-13, the Ministry consulted with industry widely and repeatedly regarding program offerings and a program administration system compliant with government procurement and financial administration policies.

s.13, s.17

- Ministry staff also consulted directly with third party delivery agents and sector organizations regarding a new program administration framework and the need to comply with government policies, including the need to secure contracts through competitive procurement activities.
- At May 23, 2013, the Ministry has:
 - posted six Notices of Intent (NOI) on BCBid for short-term funding agreements to ensure on-going service while preparing for competitive procurement processes
 - one NOI resulted in an objection. As a result, an open competitive procurement process will be conducted in the next three months.
 - secured six agreements with third parties organizations/vendors
 - eight additional funding arrangements in negotiation (i.e. pending)
- The Ministry plans to undertake competitive procurement processes in line with government procurement policies for all applicable GF2 programs in the fall/winter 2013-14 (approximately 10-15 procurement processes).

Decision required:

- No decision required
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s.13



CLIFF: 177494

ISSUE NOTE

Status of:

- Mobile Abattoir Project in 100 Mile House

Background:

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s.13, s.17, s.21

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Decision required:

s.13, s.17, s.21



CLIFF: 177494

ISSUE NOTE

Status of:

- Regional District of North Okanagan Class E Licence Pilot Project

Background:

- Class E licences were introduced in April 2010 to support local livestock and meat production in remote and rural communities where existing slaughter capacity is extremely limited or non-existent. Class E Licence holders are permitted to slaughter on-farm and sell restricted amounts of uninspected meat at their farm gate and at temporary food markets.
- The Regional District of North Okanagan (RDNO) has routinely requested Class E licences be granted in the region. Existing policy has not permitted the issuance of these types of licenses to date, as Class A or B abattoirs exist within two hours of all six municipalities in the RDNO.
- On February 22, 2013, the B.C. government announced a two-year pilot project in the RDNO issuing up to five Class E licences in conjunction with the introduction of a new Code of Practice and competency based Humane Slaughter Education. The five pilot licences will be available to applicants within a two hour travel distance of a Class A or B abattoir and will participate in a two year evaluation which will commence once the license is issued.
- The pilot evaluation will consider the impact of the new requirements on Class E license holders, the impact on the local abattoirs, and the distribution of the uninspected meat in the region. Depending on the outcome of the evaluation, a change in the rationale for the issuance of licenses, would present a significant change from the original policy direction that Class E licenses only be available where there is a demonstrable lack of slaughter capacity, and that meat intended for human consumption be inspected and slaughtered in a facility that meets provincial standards.
- Given the Interior Health Authority has delegated responsibility for issuing Class E license and ongoing management, they have agreed to take the lead role on the pilot project for the Province.
- The on farm food safety code of practice is currently in development. A small consultation with existing Class E license holders (in non designated regions) will be undertaken prior to the finalization of the Code of Practice. The humane slaughter training is being managed by BC Food Processor's Association with an expert on humane slaughter being contracted to develop the training.
- The pilot project timing is on target for license applications to occur in August with the expectation for licenses to be issued in September once applicants meet all requirements.
- Both new requirements will also be expanded across the province for new Class D and E Licenses or when license renewal occurs.

Decision required:

- No decision is required on the RDNO Class E Pilot project.

ISSUE NOTE

Issue:

- Summary of Salmon Viruses and Diseases in the News

Background:

- Salmon are susceptible to many different viruses. No salmon viruses are considered to be a threat to human health.
- Viruses are common in all living things, but not all viruses cause disease. Therefore, the presence of a virus does not mean that the infected animal has a disease.
- PCR tests, when properly validated, are highly sensitive for detecting a small segment of the genetic code of viruses, bacteria, or other organisms. However, PCR tests sometimes return incorrect results (e.g., false positive test results). Therefore, additional tests are needed to confirm whether PCR test results are correct, and a positive PCR test alone cannot be used to confirm the presence of a virus or a disease. False positive test results are not a threat to wild or farm salmon.
- **Infectious hematopoietic necrosis virus (IHNV)** causes the disease infectious hematopoietic necrosis (IHN), primarily in juvenile sockeye salmon while they are in fresh water. Once sockeye salmon reach seawater, they sometimes carry the virus IHNV, but they are resistant to developing the disease IHN. Atlantic salmon are highly susceptible to IHN at all life stages. In 2012, three BC Atlantic salmon farms had IHN outbreaks (the first since 2003); all the fish in those farms were culled (killed and removed from the water) as soon as IHN was confirmed on each farm.
- **Infectious salmon anaemia virus (ISAV)** causes the disease infectious salmon anaemia (ISA) in farmed Atlantic salmon in Europe, Chile, and eastern Canada. ISAV is not known to infect or affect wild Pacific salmon exposed to environmentally relevant numbers of virus. Over the past several years, several laboratories have reported positive PCR results for ISAV in farmed and Atlantic and Pacific salmon in BC. However, in all cases, none of these test results were associated with disease, and none of these test results were confirmed with follow-up testing. Therefore, all laboratories agree that there have been no confirmed cases of ISAV or ISA in BC. The status declared by CFIA is that ISA does not occur in BC. In 2012, the Ministry's Animal Health Centre conducted 666 PCR tests for ISAV, and all results were negative--no virus.
- **Piscine reovirus (PRV)** is a newly discovered virus that has yet to be officially described. Published and unpublished scientific studies have reported that PRV is common in wild and

farmed Atlantic and Pacific salmon around the world. In Europe, PRV commonly occurs in fish with the disease **heart and skeletal muscle inflammation** (HSMI), and some scientists think that PRV is the cause of HSMI. However, European scientists also find abundant PRV in salmon populations that never develop HSMI, and Norwegian authorities do not restrict movement of fish with PRV that have no disease. In BC, the virus PRV is common, but we do not have HSMI, and PRV is not known to cause any disease in BC salmon.

- **Salmon alphavirus (SAV)** is a general name for several closely related viruses that are thought to cause **pancreas disease** (SAV1, SAV3, SAV4, SAV5, and SAV6), which affects farmed Atlantic salmon in Europe, and **sleeping disease** (SAV2, also called S49p sleeping disease virus, SDV), which affects farmed rainbow trout in freshwater. Alexandra Morton has reported finding SAV in BC farmed rainbow trout sampled from a supermarket, but she did not report that it was associated with disease, and she has not provided her reports to the public. Through the middle of May 2013, the Ministry's Animal Health Centre has tested samples for SAV from about 200 BC salmon that died on the salmon farms; all results were negative--no virus.

Summary:

- Because of advances in vaccines and veterinary medical care, overall farm fish health is very good. Because of climate change, habitat disruption, and natural variation, health of wild salmon populations is highly variable, from very good (e.g., Fraser River pink salmon) to very poor (e.g., Rivers Inlet sockeye salmon).
- All available research supports the conclusion that BC farm salmon have minimal impact of on BC wild salmon populations. When an impact is documented, for example with sea lice ten years ago, adjustments in regulation and management have been successfully used to decrease those impacts.
- DFO has primary responsibility for regulation of fish health on the farms. For specific reportable disease (e.g., infectious hematopoietic necrosis), CFIA is responsible. Neither DFO nor CFIA provide the routine diagnostic services that are provided by BC AGRI. The role of BC AGRI is similar to its role with all other domestic livestock: we provide diagnostic services to facilitate rapid diagnosis and control of infectious diseases.

Next steps:



Appendix D

- The Animal Health Centre is in the process of getting its PCR test for ISAV ISO 17025 accredited early in 2014. This is the highest international standard for test accreditation.

Decision required:

- **90 day issue - information only; no decision required.**



CLIFF: 177494

ISSUE NOTE

Not Responsive

s.12



ISSUE NOTE

Issue:

- The Buy Local program is fully subscribed and new applications are being placed on a waitlist should additional funds become available.

Background:

- In August 2012, Government announced a \$2 million Buy Local Program to support domestic consumption of local food. The funds were from the end of year (fiscal 2011-12) and not from base Ministry of Agriculture budget.
- BC Investment Agriculture Foundation (BCIAF) is responsible for delivering \$1.5 million in programming which includes \$1.36 million under an application-driven, cost-shared program, and \$45K for the development of a Smart Phone application.
- BC Agriculture Council also received \$500K to create a Buy Local campaign, but they have only had initial discussions on their program's parameters to date.
- The cost-shared program offers applicants matching funds from \$5K to \$100K to launch or expand local food marketing campaigns.
- As of March 15, BCIAF has committed \$1,143,869 in funding to 27 applicants, with another nine applicants requesting funding of \$422,000 pending review on March 26. Funding announcements have targeted a wide range of recipients from the BC Cranberry Association to the Port Alberni Farmers' Market.
- Sixty percent of the applications have come from industry associations. While the average request for funding is approximately \$76K, funding requests have been as small as \$5K up to the program maximum of \$100K.
- The program is now fully subscribed and BCIAF has posted a notice on their website that new applications will be placed on a waitlist, pending availability of funding.
- The RFP for development of a Smart Phone app closed on March 15, 2013. Fourteen proposals have been received and are being reviewed jointly by the Ministry of Agriculture and BCIAF.
- Industry interest in the cost-shared program remains high with more demand than funds available.

Decision required:

- **30 day issue: No Decision required. Funding will be fully expended within 30 days and the program will close.**

ISSUE NOTE

Issue:

- Delivery of Budget 2013's commitment to provide a carbon tax relief grant for commercial greenhouse vegetable and floriculture growers.

Background:

- In March 2012, the Government announced the previous Greenhouse Carbon Tax Temporary Rebate Program, which provided one-time funding for relief on carbon tax paid on natural gas and propane utilized for heating and CO₂ production.
 - The program was administered by the BC Greenhouse Grower's Association and the United Flower Growers Co-operative Association, with funds disbursed by a trustee.
 - \$7.6 million was disbursed to 83 floriculture and 46 vegetable greenhouses.
- As part of the 2013 budget process, the BC government conducted a review of the carbon tax. The review considered submissions made by industry, stakeholders, and the public.
- The Budget 2013 announcement is for a grant available for 2013 and future years, and will be set at 80 per cent of the carbon tax paid on specified fuels.
- The new program will apply to carbon tax paid on all natural gas and propane used by vegetable growers, floriculture, landscape nurseries, and forest seedling nurseries.
- Ministry of Agriculture staff worked with industry associations, Corporate Services for the Natural Resource Sector, and Ministry of Finance to develop a new relief grant program, which was announced in early April 2013.
- The application deadline will be in late summer 2013, with payments to be made before December 31, 2013.

Decision required:

- **This is a 30 day issue. No decision required.**

ISSUE NOTE

Issue:

- Cohen Commission Report: Provincial Response

Background:

- On October 31, 2012, the final report of the Commission of Inquiry into the Decline of Sockeye Salmon in the Fraser River was submitted to the Federal government. The report includes 75 recommendations regarding the policies, practices and procedures of Fisheries and Oceans Canada, eight of which directly or indirectly reference the Province of British Columbia.
- The Federal government has not responded to the report.
- On March 22, 2013, the Provincial government accepted the intent of recommendations regarding: riparian area management and, compliance and enforcement; the *Water Act*; marine habitat spill response; agriculture and forestry pesticide record-keeping; and including consideration of sockeye salmon in monitoring of industrial and wastewater management.
- The Provincial government's response notes the Province has no intention of issuing any new tenure agreements for net-pen salmon farms in the Discovery Islands until September 30, 2020, but will consider applications to amend tenure boundaries for reasons other than increasing production.
- The media reaction to the Provincial response has been very limited and balanced. The Province's response has caused some concern from the aquaculture industry.
- The Provincial government will work with our federal counterparts and aquaculture operators to monitor for all possible diseases and is prepared to implement a prompt, coordinated, and science-based response if required.
- Results of thousands of tests for Infectious Salmon Anemia Virus done by the Ministry of Agriculture have all been negative (no virus). Similarly, the Canadian Food Inspection Agency has implemented a survey of wild salmon in BC and all results to date for Infectious Salmon Anemia Virus have been negative.

Decision required:

- **No Decision Required**
- The Provincial Response was released March 22, 2013.
- The Provincial government will continue to work with our federal counterparts on the eight recommendations directed at the Province.

ISSUE NOTE

Issue:

- Fisheries governance within the Provincial Government

Background:

- Fisheries and Oceans Canada (DFO) is responsible for the Government of Canada's constitutional authority for coastal and inland fisheries and is responsible for the conservation and protection of fish and fish habitat as detailed in the federal *Fisheries Act*.
- DFO has jurisdictional responsibility for marine and freshwater fisheries, aquaculture¹ and Aboriginal fisheries. BC has jurisdictional responsibility for post-harvest commercial seafood business activities (under the BC *Fisheries Act* and *Fish Inspection Act*) and, through delegated authority under the federal *Fisheries Act*, responsibility for freshwater fisheries (excluding salmon, other than steelhead). See Table 1.
- Within the Province's scope of authority, the Ministry of Agriculture (AGRI), Ministry of Environment (ENV), and the Ministry of Forests, Lands and Natural Resource Operations (FLNRO) have responsibilities for recreational fishing, commercial fisheries, Crown land, aquaculture and Aboriginal fisheries. The Ministry of Jobs, Tourism and Skills Training also has responsibilities for international trade and marketing of seafood products and recreational angling

s.13

s.13

Decision required:

s.13

¹ On December 18, 2010, as a result of the BC Supreme Court's Hinkson decision, DFO assumed the management of aquaculture in BC. Roles and responsibilities are still being transferred between the Province and DFO.

Table 1: Summary of federal/provincial roles and responsibilities and relevant legislation for fisheries and aquaculture.

	DFO	AGRI	FLNRO	ENV
Aquaculture	Jurisdictional authority under the <i>Fisheries Act</i> and <i>Pacific Aquaculture Regulations</i>	Fisheries & Seafood Policy: Lead policy role. <i>Fisheries Act</i>	Land Tenures & Marine Plant Aquaculture: Issue upland and near shore land tenures; water permits; license marine plant culture <i>Lands Act, Wildlife Act, Water Act, Fisheries Act</i>	Environmental Standards: Issue permits for discharge <i>Environmental Management Act</i> Water Protection and Sustainability: Freshwater policy relating to water quality and water allocation - <i>Water Act</i>
Commercial and Recreational Marine Fisheries	Jurisdictional authority under the <i>Fisheries Act</i> . Commercial fishery licensing and compliance in marine tidal waters and for salmon in freshwater. Recreational fishery licensing and compliance in marine tidal waters	Fisheries & Seafood Policy: Lead policy advisory role. Licensing and inspection of seafood processing facilities <i>Fisheries Act</i> <i>Fish Inspection Act</i>	Fish, Wildlife & Habitat: Involved when a management decision may impact freshwater fish or habitat (e.g. steelhead) ²	BC Parks, Planning and Management: Lead policy role for harvesting issues within Marine Protected Areas Provincial lead for <i>Species at Risk Act</i> referrals Ecosystems protection. Lead on Aquatic Invasive Species
Recreational And Commercial Freshwater Fisheries	Jurisdictional authority under the <i>Fisheries Act</i> . Authority is delegated to the Province for freshwater fisheries (excluding anadromous species). Regulations are issued under the federal <i>Fisheries Act</i> .	Fisheries & Seafood Policy: Involved when any fishery management decision may impact tidal fisheries. ²	Fish, Wildlife & Habitat: Lead corporate policy role; issue permits for transportation of live fish; establish angling regulations Regional Operations: Lake stocking, stock assessments, issue Rainbow Trout Pond permits and Scientific Collection permits for commercial fisheries <i>Wildlife Act</i>	Conservation Officer Service: Regulatory enforcement arm Aquatic Conservation Science: Provide scientific expertise to support the Fish Wildlife & Habitat policy team at FLNRO <i>Wildlife Act</i>

² For example, fishery management decisions in the Skeena River that impact both the Sockeye Salmon commercial fishery and the Steelhead recreational fishery.



ISSUE NOTE

Issue:

s.13, s.17, s.21

Background:

s.13, s.17, s.21

Decision required:

s.13, s.17, s.21



Appendix D

ISSUE NOTE

Issue:

- Minister's Attendance: July 17-19 Federal/Provincial/Territorial (FPT) Ministers' Meeting in Halifax, Nova Scotia

Background:

- The July meeting is the annual conference of FPT Ministers and Deputy Ministers of Agriculture, where forward policy agendas are set and key issues are discussed.
- Agenda items are expected to include: FPT policy priority setting, regulatory and inspection modernization, trade and market access, innovation recommendations from the Deans of Agricultural and Veterinary Colleges, National Program Advisory Committee (Business Risk Management programs) recommendations, and an update on Growing Forward 2.
- Agriculture is one of two areas of shared jurisdiction under the Constitution of Canada, so agri-food policy and program development is a joint FPT responsibility.

s.13, s.16, s.17

- The Minister's attendance is beneficial as:
 1. Early development of strong relationships with his/her FPT colleagues helps BC work effectively to ensure flexible and BC-friendly federal policies;
 2. Discussion will enable the Minister to learn of key FPT issues across the country; and,
 3. Minister could provide early input into Ministers' nascent forward policy agenda for Growing Forward 3 (GF3) to ensure the GF3 multilateral agreement supports BC's policy and program objectives and enables BC to use its full share of funding.
- FPT Agriculture Ministers have, in the past, attended this meeting with the Deputy Minister, Policy ADM and staff.

Decision required:

s.13, s.16

Not Responsive



Appendix D

ISSUE NOTE

Issue:

- New Provincial Meat Inspection Program

Background:

- Provincially-licensed Class A and B abattoirs can be located anywhere in the province, have no restrictions the type or number of animals that can be slaughtered, may source animals from anywhere in the province, and can sell their products to any buyers within BC. There are 59 Class A and/or B abattoirs licensed to slaughter. Class A abattoirs may also operate a meat processing facility under the Regional Health Authorities.
- Class D and E licences allow a restricted volume of on-farm slaughter to farmers whose slaughter service needs cannot be met by existing licensed facilities. These licenses are issued in designated regions and non-designated regions. In designated regions, E licences are issued in remote regional districts that do not have the volume of livestock required to sustain a Class A or B abattoir. Class D licence holders are permitted to sell their meat to retail establishments. In non-designated regions, Class E applicants are required to submit a Feasibility Study to identify their unique slaughter needs that cannot be met by local licensed abattoirs. Meat from D and E licences can only be sold within the regional district it was produced. There are 92 Class D and E licences, with 62 Class D and E licenses in the designated regions and 30 Class E licenses in non-designated regions.

Recent Decisions and Changes:

- The Canadian Food Inspection Agency will discontinue meat inspection services in provincially-licensed abattoirs in BC by December 31, 2013.
- After extensive consultation, Cabinet approved a comprehensive new meat inspection system for BC. As a result, the Ministry of Agriculture is responsible for ensuring a safe, sustainable and cost-effective provincial meat inspection system for BC and must:
 - Develop and implement a new Provincial Meat Inspection Program for provincially-licensed Class A and B abattoirs by December 31, 2013;
 - Pursue, in cooperation with BC's retail sector, expansion of the domestic market for meat processed in provincially-licensed Class A or B abattoirs and work with the BC Association of Cattle Feeders to further develop and promote their "Certified B.C. Beef" brand;

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Not Responsive



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- Improve the requirements for on-farm slaughter license holders related to food safety and humane slaughter. This includes: a new compulsory code of practice and compulsory competency-based education on humane slaughter practices for all licensees; a two-year pilot project that will issue five E licenses in the Regional District of the North Okanagan; and the assessment of the impact of the pilot projects to evaluate the requirements and assess the feasibility of a different approach to issuing Class E licences; and
- Locate a mobile abattoir in 100 Mile House in time for the fall 2013 slaughter season to support the community's unique slaughter capacity circumstances and efforts to acquire a provincially-licensed red meat mobile abattoir designated. Once the 100 Mile House issue is addressed, determine if other B.C. communities demonstrate a similar need and may be eligible to apply for a mobile abattoir to be based in their community.

Decision required:

- **30 days - No decision required with a Minister briefing recommended on progress on new provincial meat inspection program implementation.**



Appendix D

ISSUE NOTE

Issue: Growing Forward 2: Overview of new agreement

- Growing Forward 2 (GF2) is a 5-year (2013 to 2018) federal-provincial-territorial policy framework and cost-shared funding agreement. GF2 is the successor to Growing Forward 1 (GF1) which expired on March 31, 2013.
- GF2 provides similar programming to GF1, with some changes to priorities and funding allocations.
- The total estimated value of Growing Forward 2 is \$426.9M, distributed as follows:

	Federal Share (60%)	Provincial Share (40%)	Total (100%)
BRM (77%)	\$185.7	\$126.2	\$311.9
Non-BRM (23%)	\$69.0	\$46.0	\$115.0
Total (100%)	\$254.7	\$172.2	\$426.9

Not Responsive

Background:

- Growing Forward 2 is comprised of the Multilateral Framework Agreement between the federal, provincial and territorial governments and a bilateral agreement between Agriculture and Agri-Food Canada and each Province/Territory.
- The Multilateral Framework Agreement governs the administration of Business Risk Management (BRM) programs. BRM programs help farmers in managing risks from income declines resulting from drought, flooding, low prices, and increased input costs. The programs work together by providing protection for different types of losses, as well as cash flow options.
- GF2 involves changes to the coverage provided in three of the BRM programs - AgriInvest, AgriStability and AgriRecovery. These changes are projected to reduce the amount of benefits to be paid, which represents a reduction to the financial investment in BRM programming as compared to GF1.
- The bilateral agreement governs the administration of non-BRM programs. GF2 includes greater investment in the suite of non-BRM programs, with increased focus on Innovation, Competitiveness, and Market Development.
- Consultation with the sector occurred on a regular basis during the development of the GF2, at both a federal and provincial level.
 - Agriculture and AgriFood Canada's national engagement process began in 2011 and focused on the national policy framework.
 - BC's consultations with the sector began in 2012 and focused on program-specific considerations that informed the Province's negotiation position and program design



Appendix D

and delivery approaches. These consultations were comprised of in-person meetings/events and a web-based survey.

Decision required:

- No decision required.
- The GF2 Multilateral Framework Agreement and bilateral agreements took effect on April 1, 2013. Programming has been launched.



ISSUE NOTE

Issue:

- Future of Ranching Task Force

Background:

- In May 2009, the Province created the Ranching Task Force to address challenges facing the ranching industry and in December 2009, the Ranching Task Force presented its final report and recommendations to the Minister of Agriculture.
- In May 2010, the Province announced a 4-Point Action Plan to improve the competitiveness of BC beef
 1. Action on 38 regulatory items identified
 - Largely completed, some are ongoing
 2. Raise the profile of BC beef
 - BC Beef Day held for the past three years at the Legislature
 3. Leverage up to \$5 million for industry initiatives
 - Ranching Task Force Funding Initiative (AgriFlexibility) in place - \$3.8 million allocated with \$500K left to allocate – all projects completed or due for completion by March 2014
 4. Beef Cattle Industry Development Fund extension
 - Completed

s.13

- The Ranching Task Force has been advised that government will be reviewing the structure of all committees to ensure that they are co-ordinated and efficient for both government and industry.

Decision required:

s.13

ISSUE NOTE

Issue:

- Peace River Site C Dam Project.

Background:

- The Site C dam project is a proposal by the British Columbia Hydro and Power Authority (BC Hydro) for a large-scale earth fill hydroelectric dam on the Peace River, 83 kilometres (km) downriver of the Peace Canyon dam, approximately 7 km southwest of Fort St. John.
- If built, it would be the third major dam on the Peace River. The W.A.C. Bennett Dam, 19 km west of Hudson's Hope began operation in 1968. The Peace Canyon Dam was completed in 1980, 23 km downstream of the W.A.C. Bennett dam.
- In April 2010, the Provincial government announced its intention to move to the regulatory review phase. The announcement also called for the site to be operational for domestic energy production by 2020.
- The proposal requires flooding of approximately 5,340 hectares of land and over 100 km of the river valley along the Peace River and its tributaries. This would include over 3,000 hectares of wildlife habitats, heritage sites, and "Class One" and "Class Two" (most productive) agricultural land.
- Some of the land that would be temporarily or permanently occupied by the project is in the Agricultural Land Reserve (ALR) and would need to be approved as "non-farm use", excluded from the ALR, or reviewed as a matter of provincial interest under authority of section 40 of the *Agricultural Land Commission Act*.
- In January 2013, BC Hydro submitted a five-volume Environmental Impact Statement (EIS), including a review of the impact on the agricultural land base, farm operations, the agricultural economy, and food production and consumption.

s.13, s.16

Decision required:

s.13



ISSUE NOTE

Issue:

- Minister Attendance: September 22-25 Tri-National Agricultural Accord (Saskatoon)

Background:

- The 22nd annual Tri-National Agricultural Accord (Accord) – a meeting of state and provincial agriculture ministers from Canada, the United States and Mexico – will be held September 22 – 25, 2013 in Saskatoon, Saskatchewan.
- Ministerial attendance will result in the identification of agricultural issues common across North America and an opportunity to establish working relationships with the agricultural leaders of key North American jurisdictions. Through these working relationships, common understandings/outcomes can be developed on such issues as trade irritants and ways to make shared industries more efficient through harmonization of standards.
- The last time the Minister of Agriculture attended an Accord conference was in 2007 in Monterrey, Mexico.
- Saskatchewan is seeking indications from other provinces on whether they will attend the Accord. As part of the New West Partnership, there is some obligation for the Ministry of Agriculture to attend in support of our provincial partner.

Decision required:

- A decision on attendance is a 60 day issue.

s.13

ISSUE NOTE

Issue:

- Negotiation of reciprocal fishing and port access in the Canada-United States Pacific Albacore Tuna Treaty

Background:

- The Canada-United States Albacore Tuna Treaty (the Treaty) was signed in 1981, after changes in ocean temperatures caused the majority of Pacific albacore tuna stocks to shift northward into Canadian waters. In recent years, the majority of the albacore stocks have remained in US waters. The Treaty provided for reciprocal access to ports for albacore landings and vessel supplies and to Pacific Exclusive Economic Zones (EEZ) for albacore fishing. This access was suspended by the United States (US) for the 2012 season. As a consequence, the landed volume of albacore tuna caught by BC vessels was reduced from 5,415 metric tonnes, valued at \$48.2 million in 2011, to approximately 2,536 metric tonnes and \$22.6 million in 2012.

s.13, s.16

- A reduction or loss of access will reduce the value of this fishery to BC, threaten the Marine Stewardship Certification of BC Albacore and increase the fishing effort on other BC fish stocks as albacore fishermen attempt to replace lost revenue.

Decision required:

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- Ministry of Agriculture staff will remain engaged in negotiation meetings until an agreement is in place for 2013, assist in efforts to mitigate this impact and keep the Minister informed as appropriate.



CLIFF: 177494

ISSUE NOTE

Issue:

- Governance of the Agricultural Land Commission (ALC) and the BC Farm Industry Review Board (BCFIRB)

Background:

- Ministry of Agriculture is responsible for the BC agriculture sector's two administrative tribunals: ALC and BCFIRB.

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Decision required:

s.13

ISSUE NOTE

Issue: Metro Vancouver's Proposed Odour Emission Control Bylaw and Impacts to Agriculture

Background:

- In 1967, the Greater Vancouver Regional District (now Metro Vancouver) was given authority for air pollution control and air quality management through provincial pollution control legislation. The Minister of Environment (ENV) may amend, suspend or cancel any bylaw if the Minister considers it necessary in the public interest. Metro Vancouver (MV) is the only jurisdiction in British Columbia to receive delegated authority for the *Environmental Management Act*.
- In July 2012, MV staff prepared a Regulatory Discussion Paper on "*Organic Materials Processing Odour Emission Control*" for a new regulatory bylaw. MV has stated that the goal of this regulation is cost-recovery for their complaint response program. The proposed odour management program would include a permit and fee structure for certain types of odour emission sources.
- Most farm operations would have no requirements, but agriculture operations with moderate and high odour potential could be affected. These include: anaerobic digesters, large scale composting operations, as well as essential value chain farm services such as rendering plants, feed plants and slaughterhouses.
- The agrifoods sectors have raised concerns about the complexity of the bylaw that may result in potential high costs and if this will result in achieving the goal of reduced odour.
- Since the Regulatory Discussion Paper was released, the Sustainable Food Alliance of BC (SFABC) was created (<http://sustainablefoodalliancebc.ca/>). The SFABC includes BC Agriculture Council, West Coast Reduction, food processors, animal feed processors, and meat processors. The group has expressed a desire to work collaboratively with MV and provincial agencies towards an alternate regulatory approach that addresses the odour issue directly within the permit process and on a facility-by-facility basis.
- Public consultation on the proposed bylaw started in November 2012 and continued until December 31, 2012. Ministry staff met with MV program staff for a briefing on November 15 and were also included in the first stakeholder workshop on November 20.
- MV has now withdrawn the current version of the bylaw to make some changes in response to feedback. After their revisions, they expect to propose a new version of the bylaw in the fall of 2013. It is expected that MV will be meeting with the BC Agriculture Council to further the consultation with the agrifoods sector after the new version is completed.

Decision required:

- **This is a public issue, but not a 30, 60, or 90 day issue for the Minister**
- Ministry staff are in ongoing consultation with BCAC, SFABC, ENV and MV regarding the regulation changes.
- Ministry staff are prepared to provide a written submission to the MV consultation process when the bylaw is back in the consultation phase.

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ISSUE NOTE

Issue:

- There is growing public and industry interest in the care and welfare of animals.

Background:

- Animal welfare is a shared federal-provincial jurisdiction. Communication and cooperation between the province and the federal government in this area is good, though tangible progress towards addressing animal welfare issues is slow.
- Within BC, the Ministry of Agriculture (AGRI) is responsible for the *Prevention of Cruelty to Animals Act* (PCAA), the main provincial legislative tool for addressing basic animal protection in the province; enforcement of the PCAA is the complete responsibility of the BC Society for the Prevention of Cruelty to Animals (BCSPCA) and as such AGRI has no enforcement responsibilities pertaining to animal welfare.
- AGRI regularly receives requests for regulatory, policy or program changes to enhance animal welfare s.13
s.13
- AGRI is developing an Animal Welfare Policy Report that defines the provincial government's roles and responsibilities with respect to animal welfare, identifies the main animal welfare issues facing the province, provides a policy framework for addressing these issues, and makes recommendations on how to improve animal welfare in BC.

Decision required:

- Recommendations in the Animal Welfare Policy Report will be provided for a decision **within 90 days.**

Not Responsive



ISSUE NOTE

Issue: The use of propane cannons to protect crops and feed causes disturbances for neighbours.

Background:

- Farmers use audible bird scare devices to prevent bird damage to crops and livestock feed.
- Complaints about the use of propane cannons have been an issue since the early 1990's. The issue has been studied extensively and information is posted on the Ministry website.
- The British Columbia Farm Industry Review Board (BC FIRB) studied the issue and released a report in May 2009. The BC FIRB did not recommend a ban on cannons, but did make several recommendations for the Ministry. The Ministry has implemented the BC FIRB report.
- The BC FIRB report encourages local governments to use the farm bylaw provisions of the *Local Government Act* to develop a local and more certain regulatory solution to prevention of losses. Many local governments report that propane cannons are not an issue in their jurisdiction.
- The British Columbia Blueberry Council continues to be a first responder to propane cannon complaints regarding blueberry production in Metro Vancouver and Fraser Valley regions. This minimizes the bylaw enforcement load on local governments.
- The Township of Langley and the City of Abbotsford are independently developing "Farm Bylaws" under section 917 of the *Local Government Act* addressing the use of propane cannons in their communities. These Farm Bylaws will require the Minister's approval to have force and effect.

s.13, s.16

- The Township of Langley draft bylaw is still under development and may be generally consistent with Ministry bylaw standards and is expected to go to Council on May 27.
- Both municipalities will likely ask the minister to approve their new bylaws in June 2013.

Decision required:

- This is a 60 day issue.

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2012

EXPORT HIGHLIGHTS

BRITISH COLUMBIA AGRIFOODS



Ministry of
Agriculture

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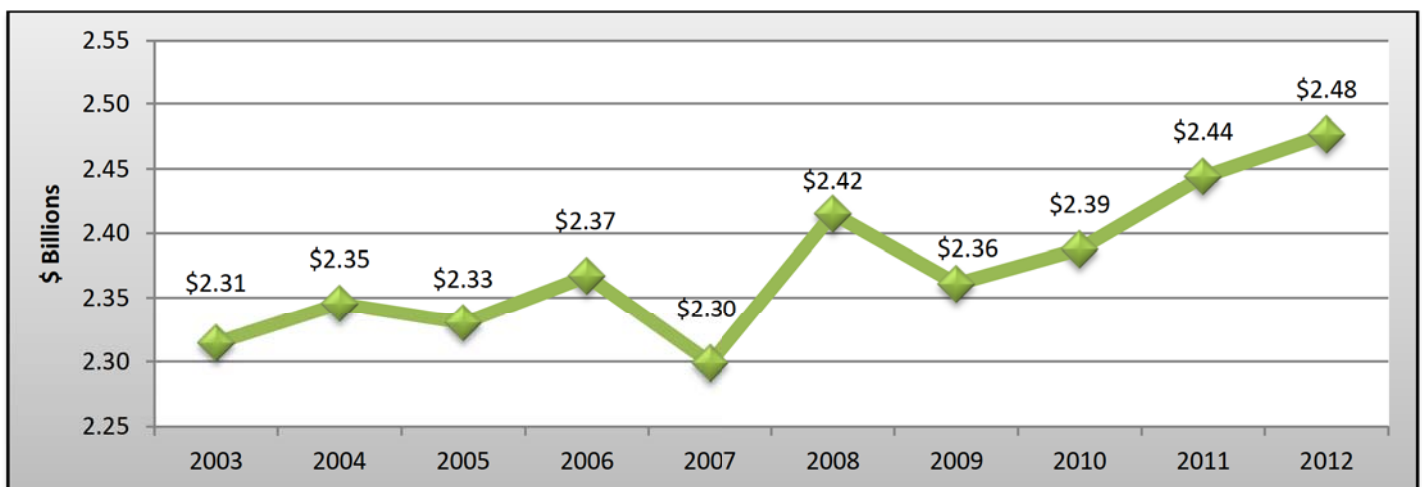
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BRITISH COLUMBIA AGRIFOODS EXPORT HIGHLIGHTS - 2012

- ❖ The value of exports of British Columbia agrifoods¹ (including agriculture² and seafood³ products) increased just over one per cent in 2012. Of this, agriculture exports rose five per cent while seafood exports fell five per cent.
- ❖ In 2012, British Columbia exported \$2.5 billion worth of agrifoods products to more than 130 countries.
- ❖ Agriculture shipments contributed 65 per cent and seafood shipments contributed 35 per cent of the total value of provincial agrifoods exports in 2012.
- ❖ The top export commodities in 2012 were cultured Atlantic salmon valued at \$291 million and blueberries at \$168 million.
- ❖ The United States (U.S.) continued to be British Columbia's largest export market with a 70 per cent share worth over \$1.7 billion.
- ❖ Commodities with the greatest growth from 2011 to 2012 included:
 - Wild chum salmon up 85 per cent to over \$18 million
 - Cranberries up 63 per cent to almost \$40 million
 - Blueberries up 31 per cent to more than \$168 million
- ❖ Markets showing significant growth from 2011 to 2012 included:
 - Russia up 77 per cent to more than \$43 million
 - China up 14 per cent to \$170 million
 - Australia up almost 14 per cent to \$23 million

TOTAL BC AGRIFOODS EXPORTS



TOP BC AGRIFOODS EXPORTS

TOP BC AGRIFOODS EXPORTS IN 2012 BY VALUE (\$ MILLIONS)

RANK	DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP MARKETS IN 2012
1	Cultured Atlantic Salmon	\$320.7	\$313.8	\$291.1	-2.1%	-7.3%	U.S., Japan, China, Taiwan
2	Blueberries	\$106.7	\$128.1	\$168.3	20.1%	31.4%	U.S., Japan, China, Australia, New Zealand
3	Food Preparations for Manufacturing ⁴	\$122.6	\$141.3	\$154.7	15.3%	9.4%	U.S., South Korea, Australia, China, Taiwan
4	Baked Goods	\$113.6	\$105.9	\$104.7	-6.8%	-1.1%	U.S., Japan, Hong Kong
5	Pork Products	\$56.9	\$73.2	\$74.4	28.5%	1.7%	China, U.S., Russia, Japan, Taiwan
6	Crabs	\$65.3	\$57.3	\$72.3	-12.2%	26.1%	China, U.S., Hong Kong
7	Mushrooms	\$69.6	\$70.7	\$69.0	1.5%	-2.4%	U.S., Japan, France, Netherlands, Switzerland
8	Chocolate & Cocoa Preparations	\$37.5	\$54.5	\$66.8	45.3%	22.5%	U.S., Japan, Australia
9	Alfalfa, Fodder & Animal Feeds	\$84.3	\$78.9	\$63.9	-6.4%	-19.0%	U.S., Japan, Czech Republic, India, South Korea
10	Tomatoes	\$68.5	\$70.5	\$59.3	2.9%	-15.8%	U.S., Japan
11	Plants, Bulbs & Flowers	\$57.1	\$58.2	\$56.8	1.9%	-2.4%	U.S., Netherlands
12	Peppers	\$50.2	\$54.9	\$56.3	9.4%	2.4%	U.S.
13	Hake	\$46.4	\$53.3	\$53.4	14.8%	0.2%	Ukraine, Russia, China, Lithuania, U.S.
14	Live Cattle & Bison	\$58.4	\$42.3	\$47.2	-27.6%	11.7%	U.S.
15	Geoduck Clams	\$43.2	\$40.1	\$43.1	-7.2%	7.7%	Hong Kong, China, Vietnam
16	Water	\$30.7	\$45.2	\$42.9	47.6%	-5.1%	U.S., Japan, Taiwan, China
17	Cherries	\$29.3	\$39.9	\$42.1	36.3%	5.6%	Hong Kong, Taiwan, U.S., Netherlands, U.K.
18	Cranberries	\$28.3	\$24.4	\$39.8	-14.0%	63.2%	U.S.
19	Poultry Products	\$30.5	\$34.4	\$38.8	13.0%	12.6%	Taiwan, Philippines, U.S., Hong Kong
20	Coffee & Tea	\$34.3	\$34.6	\$38.1	0.8%	10.2%	U.S., Australia, New Zealand
21	Shrimp & Prawns	\$30.6	\$51.1	\$37.6	66.9%	-26.4%	Japan, U.S., Hong Kong, China, Taiwan
22	Fruit Syrups & Beverage Concentrates	\$35.5	\$35.7	\$37.0	0.6%	3.7%	U.S., Australia, Romania, China, Jordan
23	Herring	\$48.1	\$29.0	\$33.9	-39.7%	16.7%	Japan, China, U.S.
24	Dairy Products	\$15.6	\$23.8	\$28.5	53.1%	19.7%	U.S., Brazil, Egypt, Australia
25	Halibut	\$28.4	\$28.8	\$26.8	1.5%	-6.9%	U.S., Germany, Japan
All Other Agrifoods		\$44.0	\$52.6	\$55.3	19.7%	5.1%	--
TOTAL AGRIFOODS		\$2,387.8	\$2,444.1	\$2,476.7	2.4%	1.3%	U.S., China, Japan, Hong Kong, Russia

Source: Statistics Canada, Global Trade Atlas, CATSNET Analytics (February 2013)

TOP BC AGRIFOODS EXPORT MARKETS

TOP BC AGRIFOODS EXPORT MARKETS IN 2012 BY VALUE (\$ MILLIONS)

RANK	MARKET	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
1	United States	\$1,635.3	\$1,654.1	\$1,722.5	1.1%	4.1%	Atlantic Salmon, Food Preparations Used in Manufacturing, Baked Goods, Blueberries, Fruit & Nuts, Chocolate & Cocoa Preparations, Mushrooms, Tomatoes, Preparations Used in Animal Feeding, Peppers
2	China	\$118.3	\$148.4	\$169.8	25.5%	14.4%	Crabs, Pork Products, Geoduck Clam, Herring, Wine, Chum Salmon, Hake, Food Preparations Used in Manufacturing, Rapeseeds, Flounder
3	Japan	\$245.3	\$190.8	\$154.7	-22.2%	-18.9%	Shrimp & Prawns, Herring, Fruit & Nuts, Sablefish, Sea Urchins, Pork Products, Atlantic Salmon, Tuna, Chinook Salmon, Water
4	Hong Kong	\$70.1	\$71.1	\$75.6	1.4%	6.3%	Geoduck Clams, Cherries, Sea Cucumber, Ginger, Shrimp & Prawns, Poultry Products, Crabs, Food Preparations Used in Manufacturing, Sea Urchins, Egg Products
5	Russia	\$25.3	\$24.5	\$43.5	-3.0%	77.4%	Hake, Pork Products, Sardines, Sea Cucumber, Pig & Poultry Fat, Meat Products, Cherries, Cattle Embryos, Food Preparations Used in Manufacturing, Pink Salmon
6	Taiwan	\$32.8	\$45.5	\$42.1	38.6%	-7.5%	Poultry Products, Cherries, Pork Products, Food Preparations Used in Manufacturing, Atlantic Salmon, Water, Shrimp & Prawns, Sea Urchins, Sardines, Apples
7	South Korea	\$47.4	\$60.3	\$40.6	27.1%	-32.6%	Food Preparations Used in Manufacturing, Vegetable & Animal Fats & Oils, Sardines, Fish Fats & Oils, Pork Products, Wheat & Meslin, Wheat Flour, Dregs From Brewing, Fruit & Nuts
8	United Kingdom	\$28.2	\$36.2	\$28.6	28.4%	-21.1%	Sockeye Salmon, Pink Salmon, Sablefish, Cherries, Margarine, Sugar Confection, Food Preparations Used in Manufacturing, Prepared Grain Products, Wheat & Meslin, Sausage Products
9	Australia	\$19.5	\$20.2	\$23.0	3.8%	13.9%	Food Preparations Used in Manufacturing, Pink Salmon, Sockeye Salmon, Coffee, Pork Products, Blueberries, Cured Pork Hams, Herring, Natural Milk Constituents, Potato Products
10	Philippines	\$16.9	\$14.3	\$15.2	-15.3%	5.9%	Poultry Products, Food Preparations Used in Manufacturing, Pork Products, Flour Meal, Soups & Broth, Salted & Dried Meat Products, Wheat & Meslin, Swine Offal, Buttermilk Products, Baked Goods
<i>All Other Export Markets</i>		\$148.7	\$178.7	\$161.2	20.1%	-9.8%	--
WORLD		\$2,387.8	\$2,444.0	\$2,476.7	2.4%	1.3%	Cultured Atlantic Salmon, Blueberries, Food Preparations Used in Manufacturing, Baked Goods, Pork Products, Crabs, Mushrooms, Chocolate & Cocoa Preparations, Alfalfa Fodder & Animal Feeds, Tomatoes

Source: Statistics Canada, Global Trade Atlas, CATSNET Analytics (February 2013)

2012 BRITISH COLUMBIA AGRICULTURE

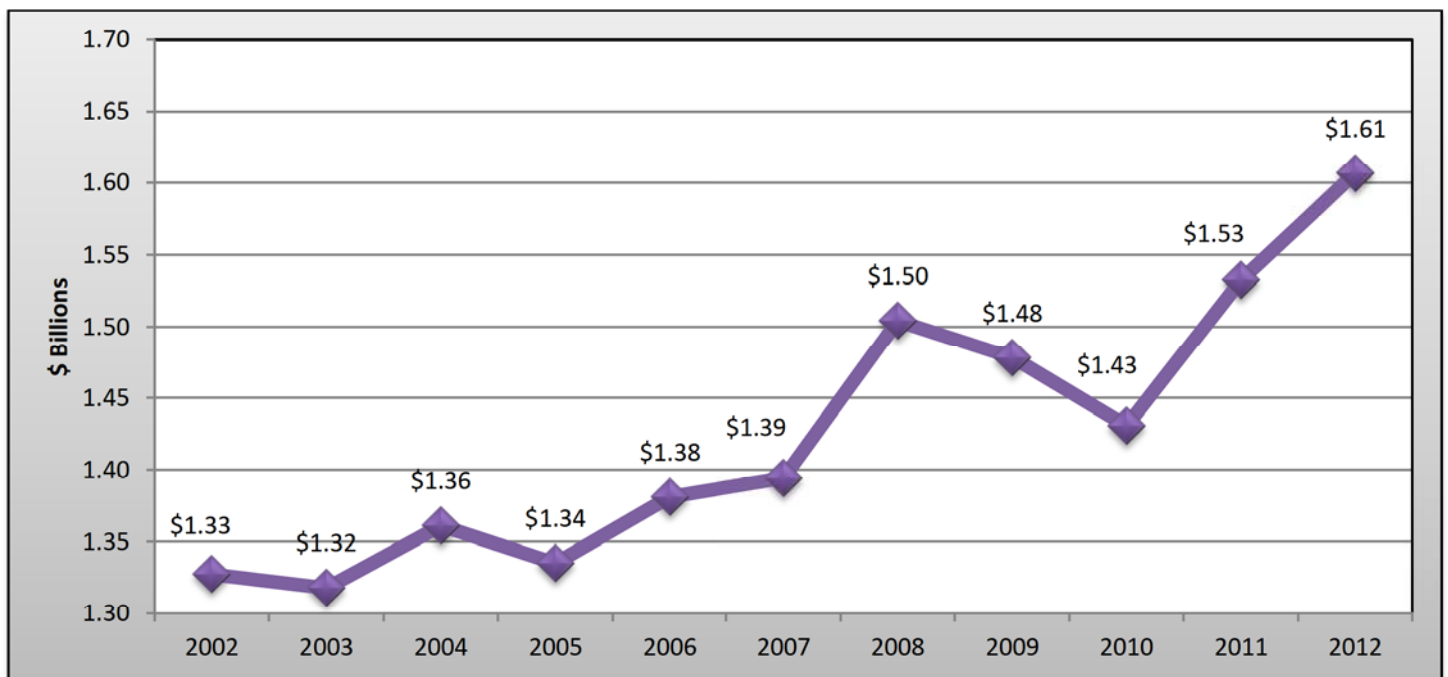


EXPORT HIGHLIGHTS

BC AGRICULTURE EXPORT HIGHLIGHTS - 2012

- ❖ BC exported \$1.6 billion worth of agriculture products to 130 different markets in 2012, an increase of five per cent over 2011.
- ❖ Eighty-eight per cent of the export value was generated by the top five markets: U.S., Japan, China, Taiwan and Hong Kong.
- ❖ Four of BC's top 10 export markets all received a record amount of exports in 2012: China (\$49 million), Hong Kong (\$31 million), Australia (\$16 million) and Russia (\$15 million)
- ❖ Exports of fruit and nut products increased by 28 per cent in 2012, rising from \$268 to \$343 million.
- ❖ Exports of vegetable products decreased by seven per cent in 2012, falling from \$233 to \$217 million.
- ❖ Exports of animals and animal products increased by five per cent in 2012, from \$213 million to \$223 million.
- ❖ Wine exports grew by 34 per cent in 2012, rising to almost \$8 million, with over 90 per cent destined for the Chinese market.

TOTAL BC AGRICULTURE EXPORTS



TOP BC AGRICULTURE EXPORTS

TOP BC AGRICULTURE EXPORTS IN 2012 BY VALUE (\$ MILLIONS)

DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP MARKETS IN 2012
Blueberries	\$106.7	\$128.1	\$168.3	20.1%	31.4%	U.S., Japan, China, Australia, New Zealand
Food Preparations for Manufacturing	\$122.6	\$141.3	\$154.7	15.3%	9.4%	U.S., South Korea, Australia, China, Taiwan
Baked Goods	\$113.6	\$105.9	\$104.7	-6.8%	-1.1%	U.S., Japan, Hong Kong
Pork Products	\$56.9	\$73.2	\$74.4	28.5%	1.7%	China, U.S., Russia, Japan, Taiwan
Mushrooms	\$69.6	\$70.7	\$69.0	1.5%	-2.4%	U.S., Japan, France, Netherlands, Switzerland
Chocolate & Cocoa Preparations	\$37.5	\$54.5	\$66.8	45.3%	22.5%	U.S., Japan, Australia
Alfalfa, Fodder & Animal Feeds	\$84.3	\$78.9	\$63.9	-6.4%	-19.0%	U.S., Japan, Czech Republic, India, South Korea
Tomatoes	\$68.5	\$70.5	\$59.3	2.9%	-15.8%	U.S., Japan
Plants, Bulbs & Flowers	\$57.1	\$58.2	\$56.8	1.9%	-2.4%	U.S., Netherlands
Peppers	\$50.2	\$54.9	\$56.3	9.4%	2.4%	U.S.
Live Cattle & Bison	\$58.4	\$42.3	\$47.2	-27.6%	11.7%	U.S.
Water	\$30.7	\$45.2	\$42.9	47.6%	-5.1%	U.S., Japan, Taiwan, China
Cherries	\$29.3	\$39.9	\$42.1	36.3%	5.6%	Hong Kong, Taiwan, U.S., Netherlands, UK
Cranberries	\$28.3	\$24.4	\$39.8	-14.0%	63.2%	U.S.
Poultry Products	\$30.5	\$34.4	\$38.8	13.0%	12.6%	Taiwan, Philippines, U.S., Hong Kong
Coffee & Tea	\$34.3	\$34.6	\$38.1	0.8%	10.2%	U.S., Australia, New Zealand
Fruit Syrups & Beverage Concentrates	\$35.5	\$35.7	\$37.0	0.6%	3.7%	U.S., Australia, Romania, China, Jordan
Dairy Products	\$15.6	\$23.8	\$28.5	53.1%	19.7%	U.S., Brazil, Egypt, Australia
Pasta	\$26.4	\$25.5	\$23.4	-3.6%	-8.1%	U.S.
Industrial By-Products & Residues	\$23.1	\$48.7	\$23.1	110.5%	-52.5%	U.S., South Korea, Japan, Panama, Guatemala
Sugar & Sugar Confectionary	\$19.7	\$18.6	\$20.5	-5.4%	10.1%	U.S., U.K., Germany, Japan, China
Wheat Flour	\$14.9	\$24.4	\$17.4	63.6%	-28.6%	U.S., Hong Kong, South Korea
Apples	\$12.9	\$14.6	\$16.8	12.9%	15.0%	U.S., Mexico, Vietnam, Taiwan, India
Dough & Mixes for Baking	\$15.7	\$17.0	\$13.0	8.8%	-23.5%	U.S., Japan
Cucumbers	\$13.9	\$14.0	\$12.0	1.0%	-14.4%	U.S.
<i>All Other Agriculture Products</i>	\$274.6	\$253.3	\$292.0	-7.8%	15.3%	--
TOTAL AGRICULTURE PRODUCTS	\$1,430.8	\$1,532.7	\$1,606.9	7.1%	4.8%	U.S., Japan, China, Taiwan, Hong Kong

Source: Statistics Canada, Global Trade Atlas (February 2013)

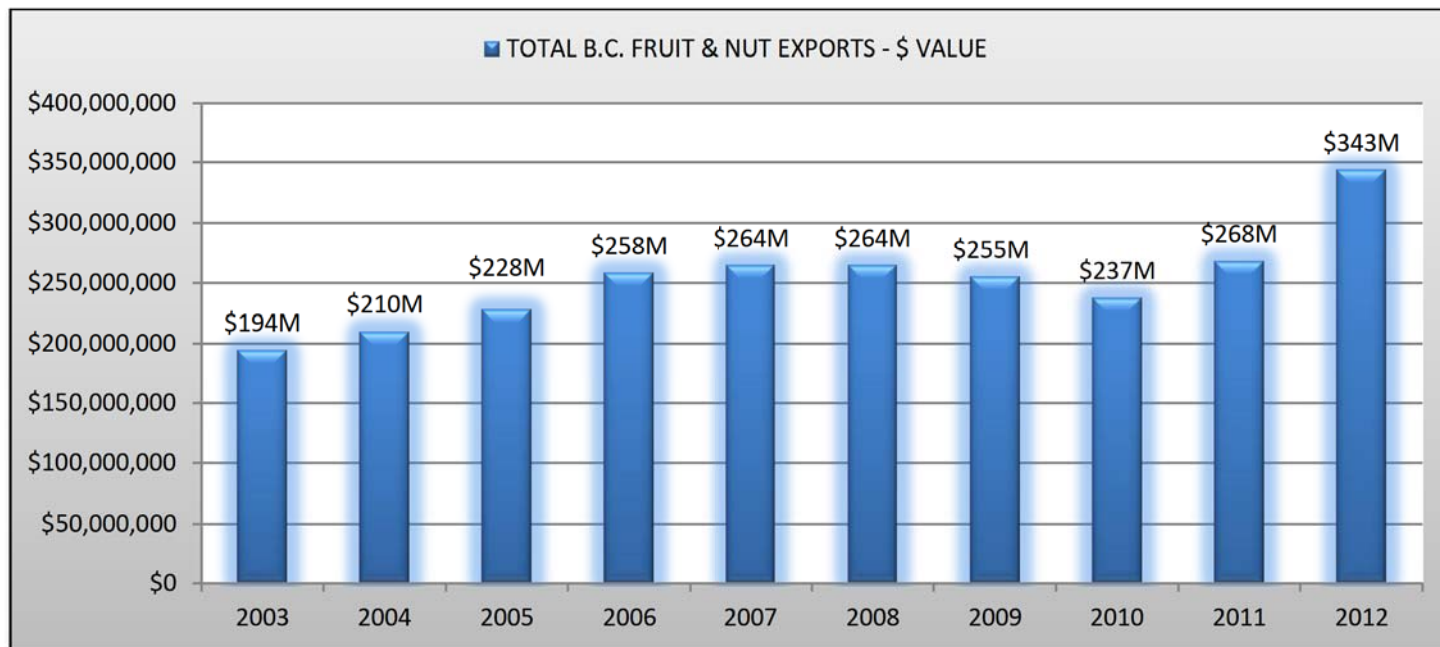
TOP BC AGRICULTURE EXPORT MARKETS

TOP BC AGRICULTURE EXPORT MARKETS IN 2012 BY VALUE (\$ MILLIONS)

RANK	EXPORT MARKET	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP PRODUCTS IN 2012
1	United States	\$1,101.0	\$1,136.4	\$1,242.5	3.2%	9.3%	Food Preparations Used in Manufacturing, Baked Goods, Blueberries, Chocolate & Cocoa Preparations, Mushrooms
2	Japan	\$74.2	\$82.0	\$58.5	10.5%	-28.6%	Frozen Blueberries, Pork Products, Water, Rapeseeds, Baked Goods
3	China	\$38.2	\$39.0	\$48.9	2.1%	25.2%	Pork Products, Wine, Food Preparations Used in Manufacturing, Rapeseeds, Frozen Blueberries
4	Taiwan	\$26.3	\$34.0	\$34.6	29.1%	1.7%	Poultry Products, Cherries, Pork Products, Food Preparation Used in Manufacturing, Water
5	Hong Kong	\$20.6	\$23.1	\$31.3	12.2%	35.4%	Cherries, Ginseng, Poultry Products, Food Preparation Used in Manufacturing, Egg Products
6	South Korea	\$25.1	\$42.5	\$23.2	69.0%	-45.3%	Food Preparations Used in Manufacturing, Vegetable & Animal Fats & Oils, Pork Products, Wheat & Meslin, Wheat Flour
7	Australia	\$13.1	\$13.3	\$16.1	1.8%	21.1%	Food Preparations Used in Manufacturing, Pork Products, Coffee, Blueberries, Natural Milk Constituents
8	Philippines	\$16.7	\$14.2	\$15.2	-14.8%	6.8%	Poultry Products, Food Preparations Used in Manufacturing, Pork Products, Flour Meal, Soups & Broths
9	Russia	\$4.0	\$4.2	\$14.7	6.4%	248.6%	Pork Products, Pig & Poultry Fats, Meat Products, Cherries, Cattle Embryos
10	United Kingdom	\$8.1	\$9.1	\$8.9	12.6%	-2.8%	Cherries, Margarine, Sugar Confection, Food Preparations Used in Manufacturing, Prepared Grain Products
Other Countries		\$103.6	\$135.0	\$113.1	30.4%	-16.2%	--
WORLD		\$1,430.8	\$1,532.7	\$1,606.9	7.1%	4.8%	Food Preparations Used in Manufacturing, Blueberries, Baked Goods, Pork Products, Mushrooms

Source: Statistics Canada, Global Trade Atlas (February 2013)

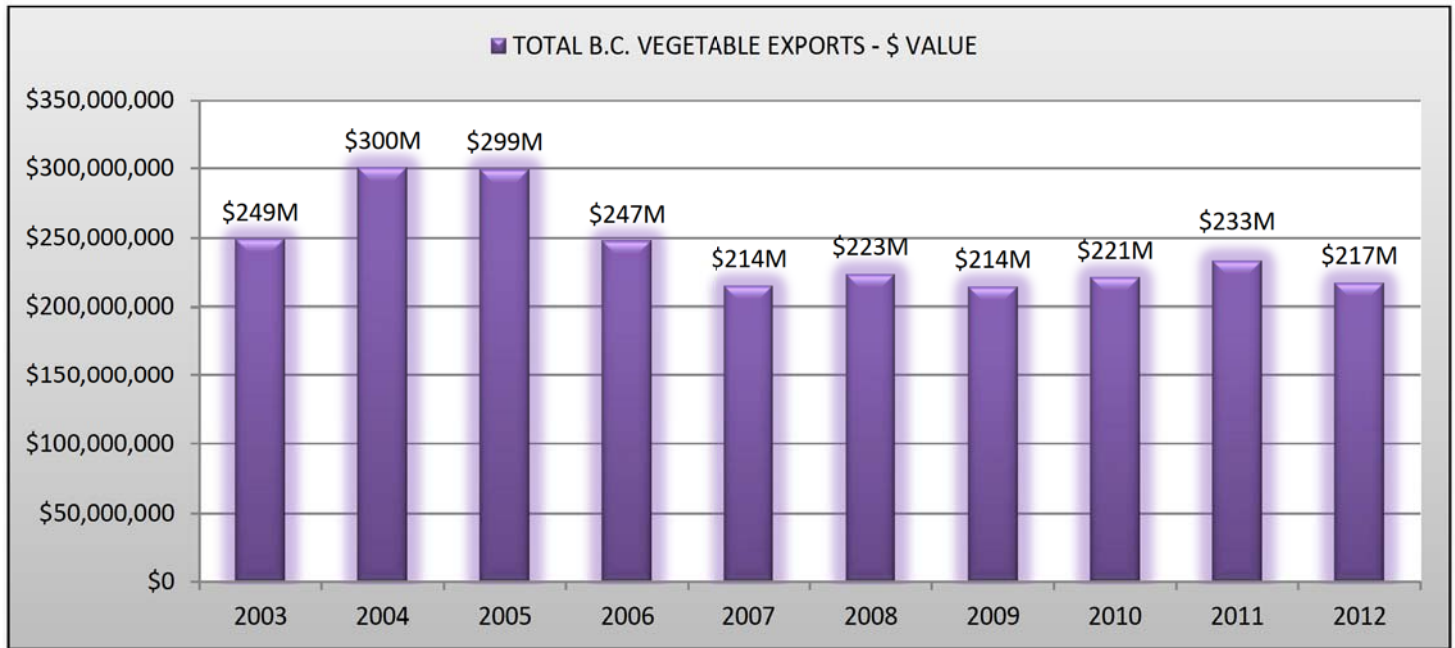
TOP BC EXPORTS – FRUIT & NUT PRODUCTS



DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP MARKETS IN 2012
Blueberries	\$106,691,479	\$128,099,558	\$168,344,841	20.1%	31.4%	U.S., Japan, China, Australia, New Zealand
Cherries	\$29,267,515	\$39,895,649	\$41,389,188	36.3%	3.7%	Hong Kong, Taiwan, U.S., Netherlands, U.K.
Cranberries	\$28,338,930	\$24,376,016	\$39,782,718	-14.0%	63.2%	U.S.
Apples	\$12,913,907	\$14,583,787	\$16,777,957	12.9%	15.0%	U.S., Mexico
Raspberries	\$11,105,484	\$10,124,092	\$9,217,410	-8.8%	-9.0%	U.S., Japan, South Korea, Hong Kong, China
Apricots	\$3,000	\$157,077	\$1,493,031	5,135.9%	850.5%	Turkey, Malaysia
Grapes	\$112	\$1,537,965	\$595,816	1,373,083.0%	-61.3%	Netherlands, Barbados, China
Hazelnuts	\$1,045,736	\$595,076	\$381,091	-43.1%	-36.0%	U.S., China
Currants/Gooseberries	\$263,502	\$186,192	\$234,819	-36.2%	39.6%	Japan, U.S.
Strawberries	\$254,271	\$132,075	\$169,487	-48.1%	28.3%	U.S., New Zealand, Indonesia
Pineapples	\$106,811	\$153,209	\$155,287	43.4%	1.4%	U.S.
Pears	\$100,780	\$48,780	\$40,446	-51.6%	-17.1%	Hong Kong, U.S.
Melons	\$409,544	\$146,178	\$17,886	-64.3%	-87.8%	U.S.
Figs	\$0	\$155,691	\$0	100.0%	-100.0%	--
Walnuts	\$11,000	\$102,300	\$0	830.0%	-100.0%	--
Macadamia Nuts	\$11,993	\$38,450	\$0	220.6%	-100.0%	--
Peaches/Nectarines	\$29,504	\$7,440	\$0	-74.8%	-100.0%	--
Other Fruit & Nut Products	\$46,882,587	\$47,639,453	\$64,667,882	1.6%	35.0%	--
TOTAL FRUIT & NUT PRODUCTS	\$237,436,155	\$267,960,988	\$343,267,859	12.9%	28.1%	U.S., Hong Kong, Japan, Taiwan, China

Source: Statistics Canada, CATSNET Analytics (February 2013)

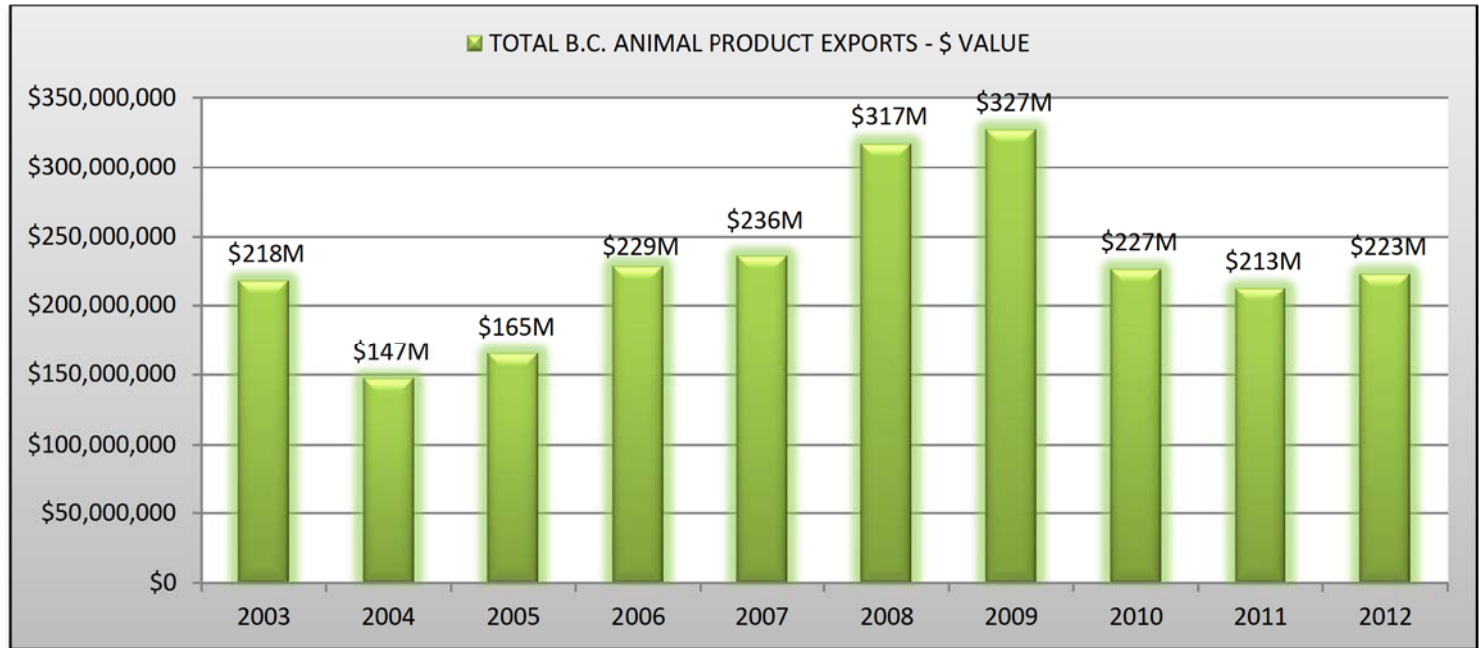
TOP BC EXPORTS – VEGETABLE PRODUCTS



DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP MARKETS IN 2012
Mushrooms	\$69,591,461	\$70,659,360	\$68,976,156	1.5%	-2.4%	U.S., Japan, France, Switzerland, Netherlands
Tomatoes	\$68,503,581	\$70,513,895	\$59,347,610	2.9%	-15.8%	U.S., Japan
Peppers	\$50,234,646	\$54,944,930	\$56,259,011	9.4%	2.4%	U.S.
Cucumbers	\$13,901,903	\$14,045,636	\$12,025,768	1.0%	-14.4%	U.S.
Potatoes	\$4,513,027	\$4,487,680	\$7,727,111	-0.6%	72.2%	U.S., China
Beans	\$3,607,116	\$3,965,543	\$3,436,689	9.9%	-13.3%	U.S., Japan
Chickpeas	\$343,005	\$2,320,598	\$1,719,845	576.5%	-25.9%	United Arab Emirates, Turkey, U.S.
Lettuce	\$38,071	\$688,651	\$1,091,334	1,708.9%	58.5%	U.S.
Eggplant	\$557,785	\$366,121	\$596,583	-34.4%	62.9%	U.S.
Beetroot/Radishes	\$516,620	\$378,931	\$430,864	-26.7%	13.7%	U.S.
Peas	\$4,085,851	\$4,584,781	\$287,616	12.2%	-93.7%	India, U.S., Taiwan
Brussels Sprouts	\$73,762	\$118,179	\$156,845	60.2%	32.7%	U.S.
Onions	\$153,222	\$80,649	\$53,725	-47.4%	-33.4%	U.S.
Celery	\$99,919	\$45,611	\$33,236	-54.4%	-27.1%	U.S.
Carrots	\$280,141	\$433,058	\$25,006	54.6%	-94.2%	U.S.
Turnips	\$17,446	\$103,190	\$12,710	491.5%	-87.7%	U.S.
Sweet Corn	\$1,560	\$52,641	\$6,105	3274.4%	-88.4%	Japan
Other Vegetable Products	\$4,335,404	\$4,845,214	\$4,835,952	11.8%	-0.2%	--
TOTAL VEGETABLE PRODUCTS	\$220,854,520	\$232,634,668	\$217,022,166	5.3%	-6.7%	U.S., Japan, China, Colombia, Netherlands

Source: Statistics Canada, CATSNET Analytics (February 2013)

TOP BC EXPORTS – ANIMALS & ANIMAL PRODUCTS



DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP MARKETS IN 2012
Pork Products	\$56,924,891	\$73,168,751	\$74,404,479	28.5%	1.7%	China, U.S., Russia, Japan, Taiwan
Live Cattle	\$58,391,476	\$42,257,997	\$47,210,383	-27.6%	11.7%	U.S.
Poultry Products	\$30,487,003	\$34,444,336	\$38,777,069	13.0%	12.6%	Taiwan, Philippines, U.S., Hong Kong, Benin
Dairy Products	\$15,551,045	\$23,804,434	\$28,495,531	53.1%	19.7%	U.S., Brazil, Egypt, Australia
Furskins	\$22,427,206	\$9,799,796	\$9,220,027	-56.3%	-5.9%	U.S., Denmark, China
Live Horses	\$14,221,378	\$8,265,803	\$5,790,911	-41.9%	-29.9%	U.S., Switzerland, Germany
Sausages & Similar Products	\$4,015,698	\$3,734,927	\$3,902,931	-7.0%	4.5%	U.S., Hong Kong, U.K., New Zealand
Eggs	\$2,285,595	\$2,336,343	\$2,724,223	2.2%	16.6%	U.S., Hong Kong, Singapore, South Korea
Pig & Poultry Fats	\$1,862,432	\$1,468,299	\$1,568,545	-21.2%	6.8%	Russia, Japan, China, Taiwan, Philippines
Live Chickens	\$2,531,178	\$1,618,926	\$812,587	-36.0%	-49.8%	U.S.
Raw Hides & Skins	\$1,035,702	\$357,620	\$590,069	-65.5%	65.0%	Vietnam, China, Germany, U.S., Japan
Live Hogs	\$953,353	\$12,221	\$0	-98.7%	-100.0%	--
Other Livestock & Animal Products	\$15,935,744	\$11,248,181	\$9,853,044	-29.4%	-12.4%	--
TOTAL ANIMALS & ANIMAL PRODUCTS	\$226,622,701	\$212,517,634	\$223,349,799	-6.2%	5.1%	U.S., China, Taiwan, Russia, Philippines

Source: Statistics Canada, Global Trade Atlas, CATSNET Analytics (February 2013)

2012 BRITISH COLUMBIA SEAFOOD



EXPORT HIGHLIGHTS

BC SEAFOOD EXPORT HIGHLIGHTS - 2012

- ❖ BC exported \$870 million worth of seafood products to 62 different markets in 2012, a decrease of five per cent from 2011.
- ❖ Eighty-nine per cent of BC's total seafood export value was generated by the top five markets: U.S., China, Japan, Hong Kong and Russia.
- ❖ Exports in the "other seafood products and species" category rose 14 per cent from \$37 to almost \$43 million in 2012.
- ❖ Shellfish exports rose to over \$191 million in 2012, a one per cent increase over the \$190 million in 2011.
- ❖ Exports of groundfish products decreased by 10 per cent in 2012, falling from \$153 to \$138 million.
- ❖ Exports of salmon products decreased by more than nine per cent in 2012 to \$424 million - down from \$467 million in 2011.

TOTAL BC SEAFOOD EXPORTS



TOP BC SEAFOOD EXPORTS

TOP BC SEAFOOD EXPORTS IN 2012 BY VALUE (\$ MILLIONS)

PRODUCT DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
Cultured Atlantic Salmon	\$320.7	\$313.8	\$291.1	-2.1%	-7.3%	U.S., Japan, China, Taiwan
Crabs	\$65.3	\$57.3	\$72.3	-12.2%	26.1%	China, U.S., Hong Kong
Hake	\$46.4	\$53.3	\$53.4	14.8%	0.2%	Ukraine, Russia, China, Lithuania, U.S.
Geoduck Clams	\$43.2	\$40.1	\$43.1	-7.2%	7.7%	Hong Kong, China, Vietnam
Shrimp & Prawns	\$30.6	\$51.1	\$37.6	66.9%	-26.4%	Japan, U.S., Hong Kong, China, Taiwan
Herring	\$48.1	\$29.0	\$33.9	-39.7%	16.7%	Japan, China, U.S.
Halibut	\$28.4	\$28.8	\$26.8	1.5%	-6.9%	U.S., Germany, Japan
Sockeye Salmon	\$101.4	\$31.8	\$24.0	-68.6%	-24.6%	U.K., U.S., Australia, Japan
Wild Chum Salmon	\$3.0	\$9.9	\$18.4	234.4%	84.7%	China, U.S., Italy, France
Fish Fillets & Meat	\$20.8	\$19.1	\$18.0	-8.5%	-5.7%	U.S., Vietnam
Sablefish	\$17.5	\$17.6	\$17.5	1.0%	-1.0%	Japan, U.K., U.S., China
Wild Pink Salmon	\$22.3	\$28.8	\$16.5	28.9%	-42.8%	U.K., Belgium, New Zealand, Australia, U.S.
Wild Chinook Salmon	\$11.3	\$11.7	\$15.0	3.5%	28.2%	U.S., Japan, Italy
Tuna	\$21.8	\$17.4	\$14.8	-20.0%	-15.0%	U.S., Japan, China
Sea Urchins	\$10.1	\$13.0	\$13.2	29.2%	1.3%	Japan, Hong Kong, Taiwan
Sea Cucumber	\$0.0	\$0.0	\$12.1	--	--	Hong Kong, China, Chile, Russia
Sardines	\$17.0	\$17.2	\$12.1	1.4%	-30.1%	Thailand, South Korea, Malaysia, China, Russia
Cultured Chinook Salmon	\$15.7	\$17.6	\$11.2	11.8%	-36.0%	U.S., Japan
Oysters	\$7.5	\$9.0	\$11.1	20.4%	22.6%	U.S., Singapore, Hong Kong
Clams	\$8.3	\$6.6	\$8.1	-20.1%	23.1%	U.S., Hong Kong
Fats, oils & extracts	\$3.9	\$4.5	\$6.6	17.4%	44.7%	U.S., South Korea
Wild Coho Salmon	\$4.2	\$4.8	\$4.9	14.8%	1.1%	U.S.
Flour, meal, Pellets for Non Human Consumption	\$1.9	\$3.7	\$3.0	98.2%	-17.2%	U.S., United Arab Emirates
<i>Other Seafood Products</i>	\$107.7	\$125.0	\$105.2	16.1%	-15.8%	--
TOTAL SEAFOOD PRODUCTS	\$957.0	\$911.3	\$869.8	-4.8%	-4.6%	U.S., China, Japan, Hong Kong, Russia

Source: Statistics Canada, CATSNET Analytics (February 2013)

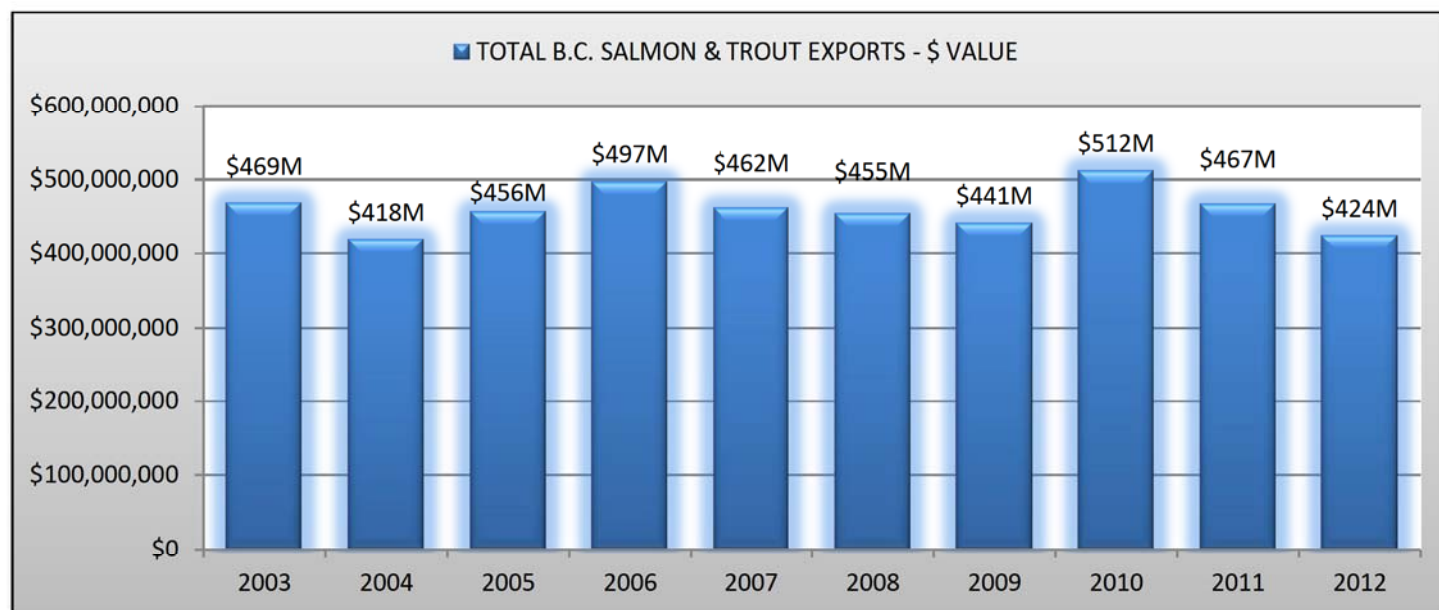
TOP BC SEAFOOD EXPORT MARKETS

TOP BC SEAFOOD EXPORT MARKETS IN 2012 BY VALUE (\$ MILLIONS)

RANK	EXPORT MARKET	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
1	United States	\$534.3	\$517.7	\$480.0	-3.1%	-7.3%	Atlantic Salmon, Halibut, Chinook Salmon, Fish Meat & Fillets, Crabs
2	China	\$80.1	\$109.4	\$120.9	36.6%	10.5%	Crabs, Geoduck Clam, Herring, Chum Salmon, Hake
3	Japan	\$171.1	\$108.8	\$96.2	-36.4%	-11.6%	Shrimp & Prawns, Herring, Sablefish, Sea Urchins, Atlantic Salmon
4	Hong Kong	\$49.5	\$48.0	\$44.3	-3.0%	-7.7%	Geoduck Clams, Sea Cucumber, Shrimp & Prawns, Crabs, Sea Urchins
5	Ukraine	\$21.3	\$20.3	\$28.8	-4.6%	41.6%	Hake, Sardines, Sea Cucumber, Pink Salmon, Flounder
6	Russia	\$20.1	\$27.1	\$19.7	34.7%	-27.4%	Sockeye Salmon, Pink Salmon, Sablefish, Dogfish, Crabs
7	United Kingdom	\$22.3	\$17.8	\$17.4	-20.4%	-2.4%	Sardines, Fish Fats & Oils, Skate, Sole, Pollock
8	South Korea	\$6.5	\$11.5	\$7.5	76.0%	-34.8%	Atlantic Salmon, Shrimp & Prawns, Sea Urchins, Sardines, Chum Salmon
9	Taiwan	\$6.4	\$6.9	\$6.9	8.0%	0.0%	Pink Salmon, Sockeye Salmon, Herring, Tuna, Halibut
10	Australia	\$4.7	\$5.0	\$6.5	7.1%	30.1%	Sardines, Sockeye Salmon, Chum Salmon, Dogfish, Pink Salmon
<i>All Other Markets</i>		\$40.8	\$39.0	\$41.7	-4.3%	6.9%	--
WORLD		\$957.0	\$911.3	\$869.8	-4.8%	-4.6%	Atlantic Salmon, Crabs, Hake, Geoduck Clams, Shrimp & Prawns

Source: Statistics Canada, CATSNET Analytics (February 2013)

TOP BC EXPORTS – SALMON & TROUT PRODUCTS



PRODUCT DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
Cultured Atlantic	\$320,731,349	\$313,836,239	\$291,069,494	-2.1%	-7.3%	U.S., Japan, China, Taiwan
Sockeye	\$101,399,311	\$31,814,826	\$23,996,942	-68.6%	-24.6%	U.K., U.S., Australia, Japan, Belgium
Chum	\$2,972,849	\$9,939,895	\$18,362,782	234.4%	84.7%	China, U.S., Italy, France, Georgia
Pink	\$22,323,419	\$28,772,404	\$16,461,609	28.9%	-42.8%	U.K., Belgium, Australia, U.S.
Chinook	\$11,289,424	\$11,684,489	\$14,978,815	3.5%	28.2%	U.S., Japan
Cultured Chinook	\$15,697,504	\$17,555,789	\$11,243,868	11.8%	-36.0%	U.S., Japan, France, Taiwan, Switzerland
Coho	\$4,211,829	\$4,834,529	\$4,886,244	14.8%	1.1%	U.S., Germany, France, Japan
Cultured Coho	\$2,106,454	\$2,428,014	\$1,125,344	15.3%	-53.7%	U.S., Japan
Cultured Trout	\$409,008	\$1,089,219	\$580,923	166.3%	-46.7%	U.S.
Other Salmon & Trout Products	\$30,366,959	\$45,277,857	\$41,175,487	49.1%	-9.1%	U.S., Japan, China, Hong Kong, Germany
Subtotal - Cultured	\$338,944,315	\$334,909,261	\$304,019,629	-1.2%	-9.2%	--
Subtotal - Wild	\$142,196,832	\$87,046,143	\$78,686,392	-38.8%	-9.6%	--
TOTAL SALMON & TROUT PRODUCTS	\$511,508,106	\$467,233,261	\$423,881,508	-8.7%	-9.3%	U.S., China, Japan, Hong Kong, Ukraine

Source: Statistics Canada, CATSNET Analytics (February 2013)

TOP BC EXPORTS – GROUND FISH PRODUCTS

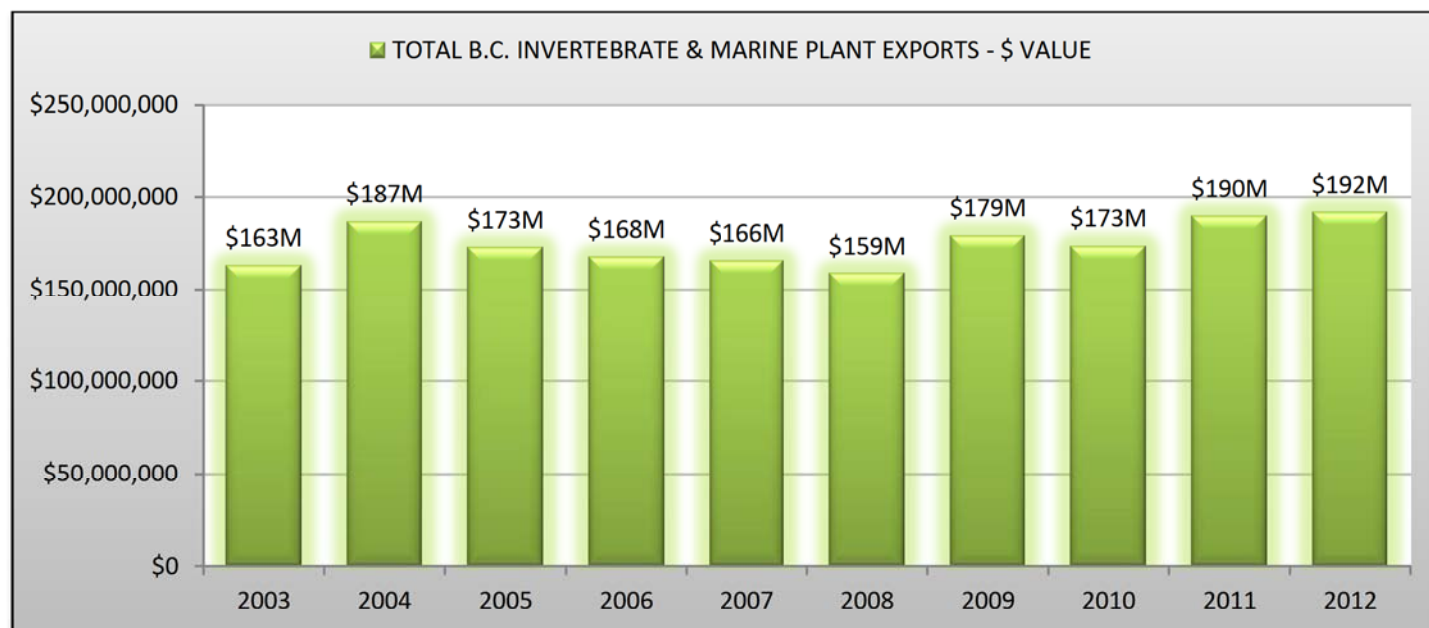


PRODUCT	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
Hake	\$46,418,169	\$53,282,043	\$53,379,274	14.8%	0.2%	Ukraine, Russia, China, Lithuania, U.S.
Halibut	\$28,400,397	\$28,815,561	\$26,851,492	1.5%	-6.8%	U.S., Germany, Japan
Sablefish	\$17,470,563	\$17,646,656	\$17,473,940	1.0%	-1.0%	Japan, U.K., U.S., China
Flounder	\$1,175,738	\$3,262,019	\$4,091,302	177.4%	25.4%	China
Pollock	\$3,825,753	\$3,455,493	\$3,471,719	-9.7%	0.5%	Ukraine, Georgia, South Korea
Cod	\$3,563,901	\$3,101,775	\$2,549,914	-13.0%	-17.8%	U.S., Japan
Sole	\$1,666,742	\$2,485,381	\$2,306,982	49.1%	-7.2%	U.S.
Dogfish	\$4,503,611	\$2,164,859	\$1,485,122	-51.9%	-31.4%	U.K., Belgium, Thailand, Germany, France
Pacific Ocean Perch	\$1,478,572	\$1,489,491	\$967,981	0.7%	-35.0%	U.S.
Lingcod	\$1,255,990	\$1,027,326	\$939,023	-18.2%	-8.6%	U.S.
Other Groundfish Products	\$40,111,482	\$36,707,349	\$24,088,078	-8.5%	-34.4%	U.S., Japan
ALL GROUND FISH PRODUCTS	\$149,870,918	\$153,437,953	\$137,604,827	2.4%	-10.3%	U.S., Ukraine, Russia, Japan, China

Source: Statistics Canada, CATSNET Analytics (February 2013)

TOP BC EXPORTS

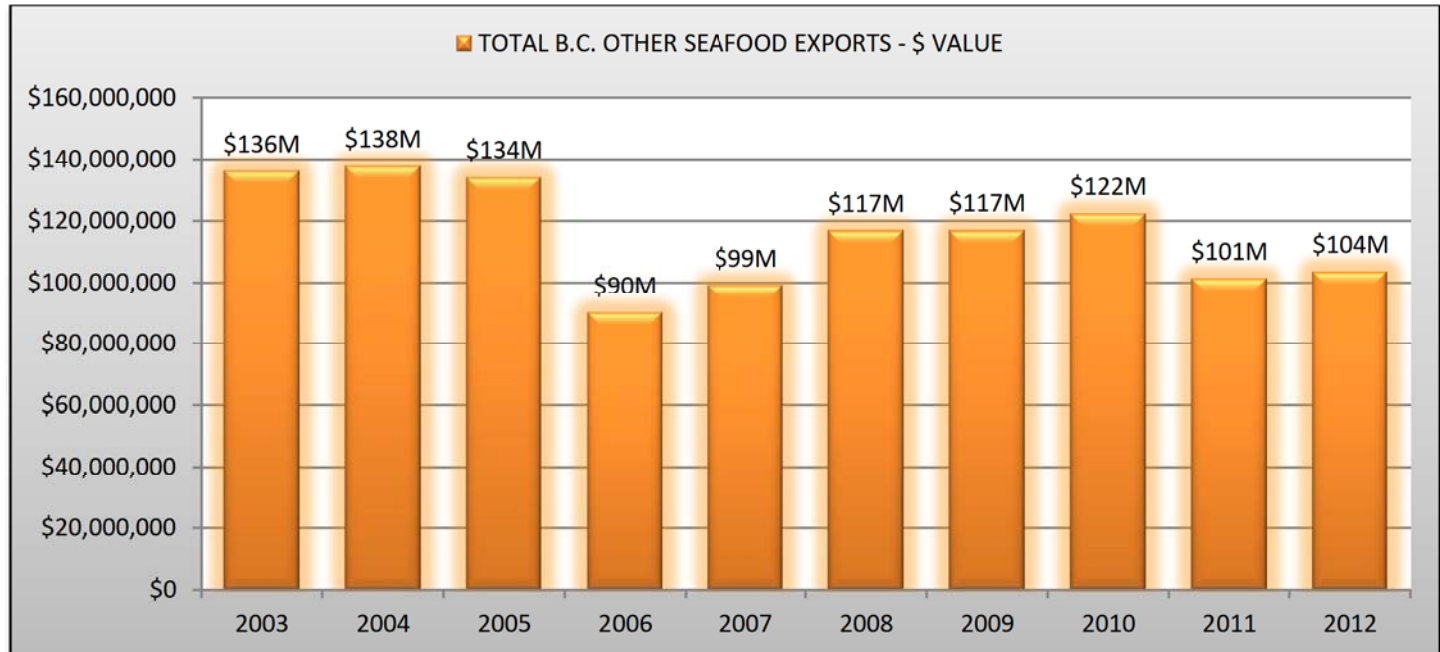
– INVERTEBRATE & MARINE PLANT PRODUCTS



PRODUCT DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
Crabs	\$65,289,548	\$57,325,014	\$72,284,289	-12.2%	26.1%	China, U.S., Hong Kong
Geoduck Clams	\$43,164,907	\$40,059,299	\$43,148,023	-7.2%	7.7%	Hong Kong, China, Vietnam
Shrimp/Prawns	\$30,636,404	\$51,134,280	\$37,631,724	66.9%	-26.4%	Japan, U.K., Hong Kong, China, Taiwan
Sea Urchins	\$10,066,427	\$13,001,089	\$13,174,540	29.2%	1.3%	Japan, Hong Kong, Taiwan
Oysters	\$7,493,288	\$9,018,575	\$11,056,412	20.4%	22.6%	U.S., Singapore, Hong Kong, China
Clams	\$8,273,373	\$6,611,785	\$8,139,073	-20.1%	23.1%	U.S., Hong Kong, China, Singapore
Scallops	\$549,479	\$421,214	\$270,785	-23.3%	-35.7%	Hong Kong
Octopus	\$98,332	\$154,036	\$62,961	56.6%	-59.1%	South Korea
Marine Plants	\$1,416,456	\$197,708	\$19,404	-86.0%	-90.2%	Indonesia
Mussels	\$283,200	\$230,489	\$16,231	-18.6%	-93.0%	U.S.
<i>Other Invertebrate & Marine Plant Products</i>	\$6,188,559	\$11,452,367	\$5,774,221	85.1%	-49.6%	Hong Kong, U.S., Vietnam, China, Japan
TOTAL INVERTEBRATE & MARINE PLANT PRODUCTS	\$173,459,973	\$189,605,856	\$191,577,663	9.3%	1.0%	China, Hong Kong, Japan, U.S., Taiwan

Source: Statistics Canada, CATSNET Analytics (February 2013)

TOP BC EXPORTS – OTHER SEAFOOD SPECIES & PRODUCTS



PRODUCT DESCRIPTION	2010	2011	2012	10-11 GROWTH	11-12 GROWTH	TOP EXPORTS IN 2012
Herring	\$48,111,670	\$29,016,914	\$33,856,614	-39.7%	16.7%	Japan, China, U.S., Australia
Tuna	\$21,815,422	\$17,446,817	\$14,834,953	-20.0%	-15.0%	U.S., Japan, China
Sardines	\$17,016,767	\$17,249,450	\$12,062,210	1.4%	-30.1%	Thailand, South Korea, Malaysia, China, Russia
<i>Other Seafood Species & Products</i>	\$35,227,293	\$37,348,956	\$42,782,555	6.0%	14.5%	U.S., South Korea, Germany
TOTAL OTHER SEAFOOD SPECIES & PRODUCTS	\$122,171,152	\$101,062,137	\$103,536,332	-17.3%	2.4%	U.S., Japan, China, South Korea, Thailand

Source: Statistics Canada, CATSNET Analytics (February 2013)

NOTES AND DEFINITIONS

1. "Agrifoods" includes "Agriculture" and "Seafood" products.
 2. "Agriculture" includes agriculture products produced by farmers, growers and ranchers in British Columbia, as well as food and beverage products manufactured by BC's food and beverage processors (regardless of where ingredients were sourced from). Agriculture does not include any fish, shellfish or marine plant products.
 3. "Seafood" includes fish, shellfish and marine plants and their products harvested or cultured in marine and freshwater.
 4. "Food Preparations for Manufacturing" includes pastes, powders and flavourings used by food manufacturers.
 5. "Industrial By-Products & Residues" includes bran, waxes, animal or vegetable fats and other by-products and residues from food and beverage manufacturing.
-

Export data provided in this analysis refers to BC Domestic Exports, not BC Origin Exports. Domestic exports consist of the exports of all goods grown, produced, extracted or manufactured in the province (British Columbia) leaving the province (through customs) for a foreign destination. Exports of imported merchandise that has been substantially enhanced in value are also included.

Export data provided in the "Agriculture" analysis has been revised from raw data released by Statistics Canada to account for apparent discrepancies regarding exports of soya beans, beef tallow, rapeseed/canola oil, oilcakes, tobacco, raw hides/skins and beef products that are believed to come from other Canadian provinces. Therefore, the total export values for BC "Agriculture" and "Agrifoods" provided in this analysis have been reduced by \$177.6 million in 2010, \$88.7 million in 2011 and \$259 million in 2012. The Ministry of Agriculture is working with Statistics Canada to investigate these discrepancies.

CONTACT INFORMATION

This report is available online at <http://www.agf.gov.bc.ca/stats>

For more information on BC agriculture, seafood and agrifoods please contact:

Ministry of Agriculture
PO Box 9120 Stn Prov Gov
Victoria, BC V8W 9B4

Agriculture and agrifoods information email: alstats@gov.bc.ca

Seafood information email: fishstats@gov.bc.ca

For more information on the Province of British Columbia please visit www.britishcolumbia.ca

February 2013

**MINISTRY OF AGRICULTURE
LEGISLATION**

Statutes

- 31 relate wholly or in part

Regulations

- 73
























Act	Regulations	Details (if applicable)
Agri-Food Choice and Quality	Organic Agricultural Products Certification Regulation Wines of Marked Quality Regulation	
Agricultural Land Commission	Agricultural Land Reserve Use, Subdivision and Procedure Regulation	
Agricultural Produce Grading	Beef Grading Regulation Egg Product Regulation Fruit and Vegetable Regulation Hatchery Regulation Hog Grading Regulation Honey Regulation Live, Dressed and Eviscerated Poultry Regulation Shell Egg Grading Regulation Veal Grading Regulation Wool Grading Regulation	
Agrologists		
Animal Disease Control	Animal Disease Control Regulation	
Bee	Bee Quarantine District Regulation Bee Regulation	
Farm Income Insurance	Farm Income Plans Regulation	
Farm Practices Protection (Right to Farm)	British Columbia Farm Industry Review Board Regulation Specialty Farm Operations Regulation	
Farmers and Womens Institutes	Farmers and Womens Institutes Act Regulation	
Farming and Fishing Industries Development	Blueberry Industry Development Fund Regulation British Columbia Salmon Marketing Council Regulation British Columbia Wine Grape Council Regulation Cattle Industry Development Council Regulation Dairy Industry Development Council Regulation Grain Industry Development Fund Regulation Mushroom Industry Development Council Dissolution Regulation New Tree Fruit Varieties Development Council Regulation Raspberry Industry Development Council Regulation Woodlot Product Development Council Regulation	
Fish Inspection	Fish Inspection Regulations	

	Form of Oath Regulation	
Fisheries	Aquaculture Regulation Fisheries Act Regulations	The Act except Part 3 as it relates to the licensing of aquaculture.
Food Products Standards		
Food Safety Act	Meat Inspection Regulation	The Act as it relates to food establishments where animals are slaughtered for food purposes.
Fur Farm	Fur Farm Regulation Licence Fee Regulation	
Game Farm	Game Farm Regulation	
Insurance for Crops	Continuous Crop Insurance Regulation	
Livestock	Livestock Regulations Pound Districts Regulation	
Livestock Identification	Livestock Identification Regulation Regulation re Strikes	
Livestock Lien		
Local Government	Right to Farm Regulation	ss. 916-919
Milk Industry	Milk Industry Standards Regulation Milk Pasteurization Regulation (repealed Feb 1, 2012)	s. 12 as that provision relates to bulk tank milk grader licences, and the remainder of the Act
Ministry of Agriculture and Food		
Ministry of Forests and Range Act		s. 4(d)(ii) and (e) as that provision relates to the portfolio of the Minister of Agriculture
Natural Products Marketing (BC)	British Columbia Broiler Hatching Egg Scheme British Columbia Chicken Marketing Scheme, 1961 British Columbia Cranberry Marketing Scheme, 1968 B.C. Egg Marketing Board Powers and Duties Regulation No. 1 B.C. Egg Marketing Board Powers and Duties Regulation No. 3 British Columbia Egg Marketing Scheme, 1967 British Columbia Hog Marketing Scheme British Columbia Milk Marketing Board Regulation British Columbia Turkey Marketing Scheme British Columbia Vegetable Scheme Natural Products Marketing (BC) Act Regulations	

Plant Protection	Bacterial Ring Rot Regulation Balsam Woolly Adelgid Regulation Blueberry Maggot Control Regulation Domestic Bacterial Ring Rot Regulation Golden Nematode Regulation Grapevine Diseases Control Regulation Little Cherry Control Regulation Tree Fruit Nursery Stock Control Regulation Trellis Rust of Pear Control Regulation North American Gypsy Moth Eradication Regulation	
Prevention of Cruelty to Animals	Prevention of Cruelty to Animals Regulation Sled Dog Standards of Care Regulation	
Seed Potato	Cariboo Certified Seed Potato Control Area Regulation Pemberton Certified Seed Potato Control Area Regulation Seed Potato Regulation	
Special Accounts Appropriation and Control		s. 9.2
Veterinarians		
Veterinary Drugs Act	Veterinary Drug and Medicated Feed Regulation Advisory Committee on Veterinary Drugs Regulation	

















**MINISTRY OF AGRICULTURE
TABLE OF BOARD APPOINTMENTS AND EXPIRATIONS**

Updated April 10, 2013

Board/Commission	Name	Position	Appointed	Reappointed	OIC/MO Current Appt	Expires	Act	Indemnity Form	Notes
BC Broiler Hatching Egg Commission	Langbroek, Casey	Chair	16-Sept- 2011  329-10.pdf		OIC 439/11  439-2011.pdf	31-Aug- 2014	Natural Products Marketing (BC) Act	 Casey Langbroek Indemnity.pdf	
BC Chicken Marketing Board	Stancil, Daphne	Chair	11-Jun- 2010  329-10.pdf	30-Jun-2012	OIC 291/12  OIC 291-2012.pdf	30-Sept- 2013	Natural Products Marketing (BC) Act	 Daphne Stancil Indemnity.pdf	
BC Chicken Marketing Board	McComish, John	Member	14-Jan-2010  OIC 010-10.pdf	08-May-2012	OIC 291/12  OIC 291-2012.pdf	30-Sept- 2013	Natural Products Marketing (BC) Act	 John McComish Indemnity.pdf	
BC Chicken Marketing Board	Gauthier, Greg	Member	11-Jun- 2010  328-10.pdf	30-Jun-2012	OIC 291/12  OIC 291-2012.pdf	30-Sept- 2013	Natural Products Marketing (BC) Act	 Greg Gauthier Indemnity.pdf	
BC Cranberry Marketing Commission	Brown, John C.	Chair	08-Mar- 2012		OIC 119/12  119-2012.pdf	08-Mar- 2015	Natural Products Marketing (BC) Act	 John Brown Indemnity.pdf	
BC Egg Marketing Board	King, Richard	Chair	06-Oct-2008  OIC 651-08.pdf	06-Oct-2011	OIC 440/11  440-2011.pdf	06-Oct- 2014	Natural Products Marketing (BC) Act	 Richard King Indemnity.pdf	
BC Farm Industry Review Board	Kilmury, Ron	Chair	11-Jun- 2010		OIC 330/10  330-10.pdf	30-Nov- 2013	Natural Products Marketing (BC) Act		
BC Farm Industry Review Board	Bertrand, Ron	Vice Chair and Member	31-Jul-2008  OIC 360-08.pdf	31-Jul-2012  330-10.pdf	OIC 767/12  767-2012.pdf OIC 407/12  OIC 407-2012.pdf	31-Jul- 2014	Natural Products Marketing (BC) Act	 Ron Bertrand Indemnity.pdf	






















**MINISTRY OF AGRICULTURE
TABLE OF BOARD APPOINTMENTS AND EXPIRATIONS**

Updated April 10, 2013

Board/Commission	Name	Position	Appointed	Reappointed	OIC/MO Current Appt	Expires	Act	Indemnity Form	Notes
BC Farm Industry Review Board	Fillmore, S. Diane	Member	22-Jun-2012		OIC 407/12  OIC 407-2012.pdf	22-Jun-2014	Natural Products Marketing (BC) Act	 Diane Fillmore Indemnity.pdf	
BC Farm Industry Review Board	Dolberg, Andreas	Member	22-Jun-2012		OIC 407/12  OIC 407-2012.pdf	22-Jun-2014	Natural Products Marketing (BC) Act	 Andreas Dolberg Indemnity.pdf	
BC Farm Industry Review Board	Van't Haaff, Corey	Member	08-Nov-2012		OIC 727/12  OIC 727-2012.pdf	30-Nov-2015	Natural Products Marketing (BC) Act	 Corey Van't Haaff Indemnity.pdf	
BC Farm Industry Review Board	Manarin, Carrie H.	Member	08-Nov-2012		OIC 407/12  OIC 727-2012.pdf	30-Nov-2015	Natural Products Marketing (BC) Act	 Carrie Manarin Indemnity.pdf	
BC Hog Marketing Commission	Rolston, Gary	Chair	31-Jul-2012		OIC 408/12  OIC 408-2012.pdf	31-Jul-2014	Natural Products Marketing (BC) Act	 Gary Rolston Indemnity.pdf	
BC Institute of Agrologists - Council		Minister <i>may</i> appoint up to 3 members				?	Agrologists Act	If appointed govt appointee can get the indemnity	
BC Milk Marketing Board	Byrne, James	Chair	04-Jul-2010  331-10.pdf	31-Jul-2012	OIC 120/12  120-2012.pdf	31-Jul-2015	Natural Products Marketing (BC) Act	 James Byrne indemnity.pdf	
BC Turkey Marketing Board	Payne, Ralph	Chair	14-Jan-2010  OIC 009-10.pdf	14-Jan-2013	OIC 710/12  OIC 710-2012.pdf	14-Jan-2016	Natural Products Marketing (BC) Act	 Ralph Payne indemnity.pdf	























**MINISTRY OF AGRICULTURE
TABLE OF BOARD APPOINTMENTS AND EXPIRATIONS**

Updated April 10, 2013

Board/Commission	Name	Position	Appointed	Reappointed	OIC/MO Current Appt	Expires	Act	Indemnity Form	Notes
BC Vegetable Marketing Commission	Taylor, David A.	Chair	11-Dec-2008  OIC 960-08.pdf	31-Dec-2011	OIC 569/11  OIC 569-11.pdf	31-Dec-2014	Natural Products Marketing (BC) Act	 David Taylor indemnity.pdf	
Council of the College of Veterinarians of British Columbia	Dewhirst, David	Public Member	 M59-10.pdf	31-Oct-2011	MO 276/11  M276-11.pdf	31-Oct-2013	Veterinarians Act	 David Dewhirst indemnity.pdf	
Council of the College of Veterinarians of British Columbia	Kucheran, Robert	Public Member	09-Dec-2010  M59-10.pdf	30-Nov-2012	MO 238/12  M238-2012.pdf	30-Nov-2015	Veterinarians Act	 Robert Kucheran indemnity.pdf	
Council of the College of Veterinarians of British Columbia	McGillivray, Barry	Public Member	29-Nov-2012		MO 257/12  M257-2012.pdf	30-Nov-2015	Veterinarians Act	 Barry McGillivray indemnity.pdf	
Provincial Agricultural Land Commission	NB. Send copies of Orders to Brian Underhill at the ALC. Do not send to the appointee.			ALL ALC MOs must be reviewed by Cabinet BEFORE being sent to OIC office					
Provincial Agricultural Land Commission	Bullock, Richard	Chair and member	11-Jun-2010  323-10.pdf	Effective 30-Nov-2013	OIC 406/12  OIC 406-2012.pdf	30-Nov-2015	Agricultural Land Commission Act	 Richard Bullock indemnity.pdf	
Provincial Agricultural Land Commission	Bullock, Richard	CEO	11-Jun-2010  324-10.pdf	09-Jun-2011	OIC 224/11  224-11.pdf	No Expiry	Agricultural Land Commission Act	 Richard Bullock indemnity.pdf	BRDO advises it will not include this on its website.
Provincial Agricultural Land Commission	Thibeault, Jerry P.	Member Kootenay Panel	09-Dec-2008  M 322-08.pdf	08-Dec-2011 Reappointed by Chair 2011  Thibeault, November 23, 2010.pdf	MO 334/11  M334-2011.pdf	31-Dec-2013	Agricultural Land Commission Act	 Jerry Thibeault indemnity.pdf	





**MINISTRY OF AGRICULTURE
TABLE OF BOARD APPOINTMENTS AND EXPIRATIONS**

Updated April 10, 2013

Board/Commission	Name	Position	Appointed	Reappointed	OIC/MO Current Appt	Expires	Act	Indemnity Form	Notes
Provincial Agricultural Land Commission	Dowswell, Denise	Member North Panel	01-Nov-2009  M256-09.pdf	15-Feb-2012 Reappointed by Chair 2011  Reappt by Chair.pdf	MO 035/12  M035-12.pdf	31-Dec-2013	Agricultural Land Commission Act	 Denise Dowswell indemnity.pdf	
Provincial Agricultural Land Commission	Pranger, Sylvia	Vice Chair and Member South Coast Panel	01-Dec-2009  OIC59-09.pdf	01-Dec-2012	OIC 709/12  OIC 709-2012.pdf	31-Jan-2014	Agricultural Land Commission Act	 Sylvia Pranger indemnity.pdf	
Provincial Agricultural Land Commission	Collins, James A.	Member North Panel	19-Jan-2010  M021-10.pdf	15-Feb-2012	MO 036/12  M036-12.pdf	31-Jan-2014	Agricultural Land Commission Act	 James Collins indemnity.pdf	
Provincial Agricultural Land Commission	Johnson, James D.	Member Okanagan Panel	23-Jun-2010  M137-10.pdf	23-Jun-2012	MO 137/12  M137-2012.pdf	30-Jun-2014	Agricultural Land Commission Act	 James Johnson indemnity.pdf	
Provincial Agricultural Land Commission	Miles, Hubert	Member Okanagan Panel	11-Jun-2010  M164-10.pdf	21-Jun-2012	MO 138/12  M138-2012.pdf	30-Jun-2014	Agricultural Land Commission Act	 Hubert Miles indemnity.pdf	
Provincial Agricultural Land Commission	Dyson, Jennifer	Vice Chair and Member Island Panel	01-Jul-2010  325-10.pdf	01-Jul-2012	OIC 405/12  OIC 405-2012.pdf	01-July-2014	Agricultural Land Commission Act	 Jennifer Dyson indemnity.pdf	
Provincial Agricultural Land Commission	Gillette, Gordon C.	Vice Chair and Member Interior Panel	01-Jul-2010  326-10.pdf	01-Jul-2012	OIC 405/12  OIC 405-2012.pdf	01-July-2014	Agricultural Land Commission Act	 Gordon Gillette indemnity.pdf	

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Board/Commission	Name	Position	Appointed	Reappointed	OIC/MO Current Appt	Expires	Act	Indemnity Form	Notes
Provincial Agricultural Land Commission	Dempsey, Lucille H.	Member Interior Panel	01-May- 2009 	15-Feb-2012 Reappointed by Chair 2011 	MO 037/12 	01-May- 2015	Agricultural Land Commission Act		

TRANSITION BRIEFING NOTE

April 10, 2013

Name: Agricultural Land Commission

Mandate:

The purpose of the Commission as set out in the *Agricultural Land Commission Act* is to preserve agricultural land; to encourage farming on agricultural land in collaboration with other communities of interest; and to encourage local governments, First Nations, the government, and its agents to enable and accommodate farm use of agricultural land and uses compatible with agriculture in their plans, bylaws, and policies.

Overview:

The Agricultural Land Commission (ALC) is an independent provincial agency responsible for the administration of the *Agricultural Land Commission Act* and is responsible for administering the provincial land use zone in favour of agriculture - the Agricultural Land Reserve. The Commission, through an application process, adjudicates land use changes related to the ALR and reviews plans and bylaws to ensure consistency with provincial objectives. To maximize its effectiveness, the Commission works with partners and stakeholders including local governments, ministries, public agencies, landowners and First Nations to encourage and enable farming of ALR lands. The preservation of agricultural land and encouragement of farming is a provincial interest that has widespread public and industry support.

Appointees:

The ALC is composed of at least seven individuals who are knowledgeable in matters relating to agriculture, land use planning, local government, or First Nation government. The Lieutenant Governor in Council must appoint one individual as a member and the Chair of the Commission and appoint one or more individuals as the Vice Chairs of the Commission. The Minister may appoint any additional members of the Commission.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: BC Broiler Hatching Egg Commission

Mandate:

The BC Broiler Hatching Egg Commission regulates in any and all respects, the production, transportation, packing and storing and marketing of broiler hatching eggs and saleable chicks sold to hatcheries.

Overview:

The British Columbia Broiler Hatching Egg Commission administers the British Columbia Broiler Hatching Egg Scheme, which is established under the *Natural Products Marketing (BC) Act*. It also manages British Columbia's participation in the national supply management system for broiler hatching eggs and broiler breeders. The Commission operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The commission consists of the Chair appointed by the Lieutenant Governor in Council, and four elected members (non-BRDO) who are registered producers, elected by the registered growers, for a total of five members.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Chicken Marketing Board

Mandate:

The BC Chicken Marketing Board regulates in any and all respects, the production, transportation, processing, packing, storing and marketing of any class of chicken under six months of age and products manufactured or derived from chicken, within the Province.

Overview:

The British Columbia Chicken Marketing Board receives its authority to regulate the chicken industry from the British Columbia Chicken Marketing Scheme, 1961, which is established under the *Natural Products Marketing (BC) Act*. It also manages British Columbia's participation in the national supply management system for meat chickens. The Board operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The Board consists of five members; three members, including the Chair, are appointed by the Lieutenant Governor in Council, and two members are elected by the growers (non-BRDO).

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Cranberry Marketing Commission

Mandate:

The BC Cranberry Marketing Commission regulates in any and all respects, the transportation, processing, packing, storage and marketing of any variety of cranberries grown in the Province of British Columbia.

Overview:

The British Columbia Cranberry Marketing Commission administers the British Columbia Cranberry Marketing Scheme, 1968, which is established under the *Natural Products Marketing (BC) Act*. The Commission operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The Board consists of the Chair appointed by the Lieutenant Governor in Council and four members (non-BRDO) who are registered producers, elected by the registered producers, for a total of five members.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Egg Marketing Board

Mandate:

The BC Egg Marketing Board regulates in any and all respects, the production, transportation, packing, storage and marketing of laying hens and layers for the purposes of egg production, including eggs wholly or partly manufactured or processed, in the province of British Columbia.

Overview:

The British Columbia Egg Marketing Board administers the British Columbia Egg Marketing Scheme, 1967, which is established under the *Natural Products Marketing (BC) Act*. It also manages British Columbia's participation in the national supply management system for table eggs and laying hens. The Board operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The board consists of the Chair appointed by the Lieutenant Governor in Council and four members (non-BRDO) who are registered producers, elected by the registered producers, for a total of five members.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Farm Industry Review Board

Mandate:

The British Columbia Farm Industry Review Board is an administrative tribunal a statutory appeal body with additional responsibilities for the general supervision of marketing boards and commissions (commodity boards) operating in the agriculture and aquaculture sectors. The mandate of FIRB is set out in three statutes:

- the *Natural Products Marketing (BC) Act* (the *NPMA*)
- the *Agricultural Produce Grading Act* (the *APGA*)
- the *Farm Practices Protection (Right to Farm) Act* (the *FPPA*).

Overview:

Under the *Natural Products Marketing (BC) Act*, the British Columbia Farm Industry Review Board (FIRB) is responsible for general supervision of the operations of commodity boards created under that *Act*; hearing appeals filed by any person who is aggrieved by or dissatisfied with orders, decisions or determinations of the commodity boards, and acting as a signatory to federal provincial agreements for supply-managed commodities.

Under the *Agricultural Products Grading Act*, FIRB may hear appeals from persons who have had their grading licences refused, suspended, revoked or not renewed.

Under the *Farm Practices Protection Act*, FIRB is responsible for hearing complaints from persons aggrieved by odour, noise, dust or other disturbances arising from agriculture or aquaculture operations, and may also study and report generally on farm practices.

Under the *Prevention of Cruelty to Animals Act*, FIRB may hear appeals from persons whose animals have been seized under sections 10.1 and 11 of the *Act*.

FIRB is accountable to government for its administrative operations, but is independent of government in its decision-making. As an independent tribunal, FIRB ensures that the public interest is served and protected.

Appointees:

The *Natural Products Marketing (BC) Act* provides that the Board is consists of up to 10 individuals appointed as follows by the Lieutenant Governor in Council after a merit based process:

- one member designated as the Chair;
- one or more members designated as the Vice Chairs after consultation with the Chair;
- and,
- other members appointed after consultation with the Chair

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Hog Marketing Commission

Mandate:

The objects of the scheme are to initiate, support or conduct programs for promoting, stimulating, increasing and improving the economic well-being of persons engaged in the production, processing and marketing of hogs, and to initiate and carry out programs for regulating, promoting, stimulating, increasing and improving the marketing of hogs.

Overview:

The British Columbia Hog Marketing Commission administers the British Columbia Hog Marketing Scheme, which is established under the *Natural Products Marketing (BC) Act*. The Commission operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The Commission consists of a chair appointed by the Lieutenant Governor in Council and up to five members who are registered producers, elected by the registered producers.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Milk Marketing Board

Mandate:

The BC Milk Marketing Board governing legislation is that of the *Natural Products Marketing (BC) Act* and the British Columbia Milk Marketing Regulation (Milk Scheme).

Overview:

The BC Milk Marketing Board is a specialized body created by a regulation under the *Natural Products Marketing (BC) Act* to regulate the production and marketing of milk in BC in accordance with the principles of supply management.

Appointees:

The Board consists of the Chair who is appointed by the Lieutenant Governor in Council, one member who is appointed by the Milk Industry Advisory Committee, and four members who are elected by the producers (non-BRDO).

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Turkey Marketing Board

Mandate:

The Board regulates in any and all respects, the production, transportation, processing, packing, storage and marketing of any class of turkey raised for meat or egg production.

Overview:

The British Columbia Turkey Marketing Board administers the British Columbia Turkey Marketing Scheme, which is established under the *Natural Products Marketing (BC) Act*. It also manages British Columbia's participation in the national supply management system for turkeys. The Board operates under the general supervision of the British Columbia Farm Industry Review Board.

Current Appointees:

The Board consists of the Chair appointed by the Lieutenant Governor in Council, and three elected producers (non-BRDO), for a total of four members.

TRANSITION BRIEFING NOTE

April 10, 2013

Name: British Columbia Vegetable Marketing Commission

Mandate:

The BC Vegetable Marketing Commission regulates the production, transportation, packing, storage and marketing of vegetables, including potatoes and strawberries intended expressly for manufacturing.

Overview:

The British Columbia Vegetable Marketing Commission administers the British Columbia Vegetable Marketing Scheme, which is established under the *Natural Products Marketing (BC) Act*. The Commission operates under the general supervision of the British Columbia Farm Industry Review Board.

Appointees:

The Commission consists of the Chair appointed by the Lieutenant Governor in Council, and up to eight members who are commercial producers, elected by the commercial producers (non-BRDO).

TRANSITION BRIEFING NOTE

April 10, 2013

Name: College of Veterinarians of British Columbia

Mandate:

The CVBC's mandate is to create, promote and enforce a high standard of qualification, conduct and competence by practitioners of veterinary medicine.

Overview:

The College of Veterinarians of British Columbia (CVBC) is the statutory body created to serve the interests of the public and animals through the regulation and advancement of the veterinary profession in BC.

Appointees:

The CVBC consists of not fewer than three and not more than five registrants that must be elected by registrants in accordance with the bylaws (non-BRDO). If the bylaws provide for the election of a certified technician, one certified technician may be elected by certified technicians in accordance with the bylaws (non-BRDO). Additionally, the Minister may appoint up to four persons to be members of the Board, who must not be registrants, former registrants or individuals qualified to be registrants.

BUSINESS RISK MANAGEMENT PROGRAMS 101

AgriRecovery

Allows governments to provide financial assistance following catastrophic loss events enabling farmers to return to full production. Under Growing Forward 2, the Guidelines have been clarified to restrict the use of AgriRecovery to extraordinary costs required to return farms to production. The program is not intended to cover income or production losses. The program does not have prescribed parameters allowing flexibility in responses. There is no predetermined budget or resources allocated to finance initiatives so specific Treasury Board approvals are required to fund AgriRecovery initiatives.

Production Insurance (known as AgriInsurance under Growing Forward 2)

This program allows farmers to purchase an insurance policy that covers them for most natural perils. More than 35 different crops are currently insurable. In 2012, farmers purchased \$460 million in insurance coverage at a total cost of \$26 million in premiums. The Federal and Provincial governments together pay more than 70% of premium costs.

s.13, s.17

s.13, s.17

Production Insurance coverage (for quantity-based programs) depends on the individual production records supplied and the market value of the crop. Farmers have the option to select deductibles and an insurable value less than the market price. As a result, the amount of Production Insurance paid will vary among farms.

2012 Production Insurance Coverage and Claims Estimates

Plan	Number of Policies	Total Value of Coverage (\$ Million)	Total Premiums (\$ Million)	*Estimate of percent Insured	Preliminary Total Estimated Claims (\$ Million)
Berries	250	88	2.7	60%	0.2
Forage	285	11	1.0	15%	0.7
Grain	215	73	7.7	85%	0.8
Grapes	331	76	2.8	70%	0.1
Tree Fruits	1,009	196	10.6	85%	11.3
Vegetables	55	14	1.1	60%	0.4
Flower Bulbs	6	2	0.1	70%	-
Total	2,151	460	26.0		**13.5

* based on a rudimentary estimate using Stats Can Census data.

** \$13 million in claims paid for the 2012 growing season

AgriInsurance program parameters were not changed under Growing Forward 2; however, the Agreement did commit to conducting a review of the program during this agreement. This review has already begun.

AgriStability

Is a program that protects producers against declines in their farming income due to market conditions, production loss or increased costs of production. A payment is made when the margin in the current year falls more than 30% below the reference margin under Growing Forward 2 which will come into affect for the 2013 taxation period. The reference margin is the average margin from three of the past five years, with the lowest and highest excluded. Governments compensate to 60% of the margin loss. Reference margin limits are also

introduced in 2013 which will affect some producers. For the 2012 taxation year, payments will continue to be made when the reference margin falls more than 15%. 2012 processing begins in the summer of 2013.

AgriStability participation is about 50% of provincial farm cash receipts, excluding supply-managed commodities. In 2010, the greenhouse vegetable, field vegetable and nursery sectors each represented 15% of the program, the berry sector 13%, the cattle sector 11%, the tree fruit sector 10%, while the floriculture sector and the grains sector each represented 5%. The decrease in government support for the 2013 taxation year is expected to decrease participation.

From 2003 to 2010, British Columbia farmers have been paid a total of \$398 million, or an annual average of

s.13, s.17

AgriStability and CAIS Program Statistics

Stabilization Year	CAIS Program					AgriStability Program			
	2003	2004	2005	2006	2007	2008	2009	2010	2011
Participation (Complete Applications)	3,956	4,351	4,122	3,392	3,001	2,523	2,704	2,714	2,242
Reference Margin for Final Applications Processed (millions)	\$368.6	\$399.8	\$392.4	\$311.8	\$307.3	\$285.3	\$261.7	\$248.7	\$92.9
Number of Applications Processed	3,956	4,351	4,122	3,392	3,001	2,523	2,687	2,540	838
Total Value of Payments (millions)	\$51.2	\$69.2	\$57.4	\$57.7	\$55.2	\$48.2	\$32.4	\$26.8	\$5.3
Percent with Payments	46%	51%	40%	50%	37%	40%	39%	30%	19%

Note - 2011 complete applications at March 18, 2013. Total payments include interims where not converted to a final benefit.

AgriInvest

Is a savings account program that began in 2007. Effective in 2013 under the Growing Forward 2 Agreement, producers can make a voluntary deposit of up to 1.0% of the farm's allowable net sales for the program year and receive a matching contribution from government. This is a reduction in support of 33% from the previous agreement where producers could deposit up to 1.5% of their allowable net sales. Producers have the flexibility to use the funds to cover small margin declines or for risk mitigation and other investments. The AgriInvest program is administered by Agriculture and Agri-Food Canada. To date, government contributions for the 2007 to 2011 program years are \$61.7 million, including \$23.4 million in start-up federal only (Kickstart) funding. 4,650 participants have withdrawn \$56.4 million and 4,513 participants have current account balances totalling \$34.9 million.

Agriculture Wildlife Program

This program provides assistance to forage, grain and livestock producers in the province of British Columbia for verified crop and livestock losses due to wildlife. The program works to integrate prevention, mitigation and compensation strategies for agriculture and wildlife conflicts where the damage compensation component would provide compensation as a “last resort” to producers enrolled in the Agriculture Wildlife Program. Key goals of the program include the equitable, consistent delivery and application of the program to all participants throughout the province. This includes the establishment of standards, common inspection forms, and a common database where all clients are maintained.

Agriculture Wildlife Program

Year	Registered Participants	Crop and Livestock Losses due to Wildlife
2008	250	\$ 1,500,000
2009	544	\$ 2,100,000
2010	598	\$ 1,737,000
2011	600	\$ 2,214,000
2012	600	s.13, s.17

**2013 TRANSITION
RECOMMENDED FOR EARLY STAKEHOLDER CONTACT BY MINISTER**

POLITICAL CONTACTS

The Honourable Gerry Ritz, Minister Agriculture and Agri-Food Canada 613-773-1059	Honourable Lyle Stewart, Minister Agriculture and Food, Province of Saskatchewan 306-787-0655
Honourable Verlyn Olson, Minister Agriculture and Rural Development Province of Alberta 780-427-2137	The Honourable Keith Ashfield, Minister Department of Fisheries and Oceans 613-992-3474 min@dfo-mpo-gc.ca
Honourable Ron Kostyshyn, Minister Agriculture, Food and Rural Initiatives Province of Manitoba 204-945-3722	

MAJOR STAKEHOLDER GROUPS

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BC Food Processors Association Dave Eto, President / Chair Nico Human, Executive Director/CEO 604-504-4409 nico@bcfpa.ca	BC Shellfish Growers' Association Yves Perrault, President 250-757-9304 office littlewingfarm@telus.net
BC Fruit Growers' Association Jeet Dukhia, President s.22 home , s.22 cell info@bcfpa.com	BC Salmon Farmers Association Vincent Erenst, Chair 250-850-3276 Vincent.Erenst@marineharvest.com
BC Association of Cattle Feeders Bill Freding, President 250-498-3077	

June 2013

**2013 TRANSITION
RECOMMENDED FOR EARLY STAKEHOLDER CONTACT BY MINISTER**

MINISTRY COMMISSION AND BOARD

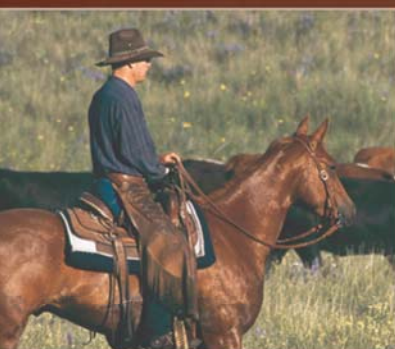
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June 2013

FAST STATS 2011

Agriculture,
Seafood and
Agrifood

► NOVEMBER 2012



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FAST STATS 2011

► SUMMARY

B.C.'s Agriculture, Aquaculture, Commercial Fishing, and Food Processing industries generated \$10.9 billion in combined gross revenues in 2011, including \$2.4 billion in international exports and an estimated \$3.6 billion in interprovincial exports.

The industry saw solid growth in agricultural farm cash receipts by 4.4%, commercial fishing receipts by 4.1%, and food manufacturing shipments by 3.9%, although aquaculture farm gate receipts fell by 13.6%.

► 2011 OVERVIEW

Climatic conditions in the province make it possible for British Columbian farmers to grow a wide variety of commodities. Total farm gate receipts from the sale of crops, including grains, oilseeds, tree fruits, berries, grapes, field and greenhouse vegetables, floriculture, nursery, forage and other crops, amounted to \$1.226 billion in 2011. Total livestock receipts, from the sale of cattle, hogs, poultry, eggs, dairy, honey and other animals and animal products, amounted to more than \$1.333 billion. Aquaculture farm gate sales, from farmed salmon, trout, clams, mussels, oysters, and scallops, totaled \$465.4 million and commercial fishing sales totaled \$344.8 million.

Along the value chain, the province's food and beverage processors generated nearly \$7.5 billion in sales. The top ten commodities in terms of farm sales in B.C. in 2011 include: dairy, farmed salmon, chicken, floriculture products, beef, nursery products, greenhouse tomatoes, blueberries, greenhouse peppers, and eggs.

In 2011, B.C. producers led the nation in sales of farmed salmon, blueberries, wild salmon, halibut, sweet cherries, rockfish, raspberries, tuna, farmed oysters, farmed clams, farmed scallops, hake, apricots, sea cucumbers, Brussels sprouts, skate, dogfish, and rhubarb; ranked second in sales of floriculture products, wild clams, nursery products, flatfishes, greenhouse tomatoes, greenhouse peppers, mushrooms, cranberries, grapes, greenhouse cucumbers, peaches, farmed trout, pears, nectarines, plums and prunes, garlic, lettuce, and pumpkins; and ranked third across the provinces in sales of dairy, chicken, eggs, turkeys, apples, farm forest products, sheep and lamb, strawberries and most of the remaining field vegetables.

The 2011 Fast Stats provides a compilation of statistical information about agriculture, aquaculture, commercial fisheries and the agrifood industry in British Columbia in 2011 and previous years.

► RESOURCES IN BRITISH COLUMBIA AGRICULTURE

	1991 Census	1996 Census	2001 Census	2006 Census	2011 Census
The Land (Hectares)					
Provincial Land Area	89,307,184	89,307,184	89,307,184	89,307,184	89,307,184
Land in Agriculture Land Reserve ¹	4,704,916	4,710,312	4,721,686	4,761,597	4,621,781
Total Farm Land	2,392,341	2,529,060	2,587,118	2,835,458 ²	2,611,382 ²
Land in Crops	556,796	565,738	617,545	586,238	599,674
Land in Pasture	241,004	240,236	233,044	245,793	226,298
Summerfallow	57,476	39,017	36,765	25,581	17,836
Unimproved Land	1,030,568	1,172,591	1,207,553	1,499,563	1,385,359
The Capital (\$'000)					
Total Value of B.C.'s Agricultural Farm Capital	8,614,244	13,822,213	15,831,578	24,904,713	34,701,683
Land and Buildings	7,037,507	11,863,945	13,066,698	22,354,892	32,183,969
Machinery and Equipment	891,629	1,227,932	1,608,420	1,820,784	1,834,254
Livestock and Poultry	685,108	730,336	1,156,460	729,036	683,459
Average Capital Value per Farm (\$)	448,075	633,030	780,265	1,255,025	1,756,247
The People And Farms (Number)					
Farm Population	61,035	68,770	61,370	60,765	na ³
Number of Farms	19,225	21,835	20,290	19,844	19,759
Number of Farms with Sales:					
less than \$10,000	10,024	11,530	10,087	9,466	9,591
\$10,000-\$49,999	4,783	5,372	5,362	5,231	5,217
\$50,000-\$99,999	1,416	1,533	1,464	1,592	1,510
\$100,000-\$249,999	1,494	1,589	1,509	1,536	1,381
\$250,000 and over	1,508	1,811	1,868	2,019	2,060

Source: Statistics Canada. Census of Agriculture 1991, 1996, 2001, 2006, 2011 unless otherwise specified.

1 Agricultural Land Commission data.

2 In B.C., Census 2006 provided a count of the total hectares of farm land that is higher than in previous years due to better quality data on lands operated under a licence, permit or lease. Direct comparison with historical census data is not possible.

3 Statistics Canada's Agricultural – Population linkage data release pending.

► B.C. AQUACULTURE SITES

	2006r	2007r	2008r	2009r	2010p	2011p
Finfish Growouts						
less than \$10,000	17	14	21	18	19	4
\$10,000 – \$49,999	5	8	4	6	3	2
\$50,000 – \$99,999	4	2	5	5	6	3
\$100,000–\$249,999	5	3	3	4	7	3
\$250,000 and over	44	50	57	58	52	50
Total Sites¹	31	27	33	91	87	62
Finfish Hatcheries						
less than \$10,000	11	10	8	5	5	2
\$10,000 – \$49,999	6	8	7	7	8	5
\$50,000 – \$99,999	2	1	2	4	2	2
\$100,000–\$249,999	2	1	0	3	4	1
\$250,000 and over	6	3	3	6	3	5
Total Sites¹	27	23	20	25	22	15
Shellfish & Marine Plants²						
less than \$10,000	83	76	100	86	83	46
\$10,000 – \$49,999	147	146	132	138	100	90
\$50,000 – \$99,999	51	39	33	42	47	42
\$100,000–\$249,999	43	40	32	19	38	19
\$250,000 and over	14	17	14	21	22	20
Total Sites¹	338	318	311	306	290	217

Source: Ministry of Agriculture Annual Aquaculture Statistical Report survey data. Sept 2012

1 Site counts by category can not be added together for total site numbers as sites can be licensed for, and therefore counted in, more than one category.

2 Includes growout and hatchery operations.

r data are revised

p data are preliminary

► B.C. FARMLAND TENURE

	Hectares	% of Total
Total Area of Census Farms¹ in 2011	2,611,383	100.0%
Total area owned	1,463,793	55.0%
Area leased from government	819,040	30.8%
Area rented or leased from others	322,855	12.1%
Area crop shared from others	27,739	1.0%
Other area used	30,453	1.1%
Areas used by others	52,497	na ²

Source: Statistics Canada Census of Agriculture 2011.

1 Note: Excludes land that was rented out to other operators

2 Areas used by others are not calculated as part of the total area of census farms; rather, those farms using the land report these areas as "area rented or leased from others".

► AQUACULTURE AREA UNDER CROWN LAND TENURE IN B.C.

Hectares										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Shellfish ¹	2,727	2,800	2,990	3,134	3,040	3,339	3,334	3,535	3,728	3,956
Salmon	1,191	2,400	3,591	3,945	3,677	4,312	4,349	4,275	4,575	4,395
Total	3,918	5,200	6,581	7,079	6,717	7,651	7,683	7,810	8,303	8,351

Source: B.C. Ministry of Agriculture, Sept 2012

¹ The term "area" refers to Crown land area only and represents the total lake, foreshore and marine area leased for aquaculture as opposed to the intensively used area. Excludes private land holdings where aquaculture operations occur.

► PRECIPITATION

Month	Vancouver Int'l Airport		Victoria Int'l Airport		Prince George		Kamloops		Fort St. John	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Precipitation (millimetres)										
January	182.8	186.3	161.4	147.3	30	9.9*	17.4	25	23.2	58.9
February	102.2	89.4	53.2	97	15.7	7.7*	11.4	16.5	0.8	31
March	108.2	152	73.4	115	3.9*	0	20.6	30	34.2	47.4
April	88	95.6	47.3	62.2	35.7*	0	13.8	11.6	9.8	47.3
May	54.2	93.8	61.1	68.3	47.6*	16.9*	54.6	53.6	46.5	12.8
June	48.4	41	28.5	14	49	35.8*	36.3	21.5	14.3	176.5
July	0.6	37.6	1	20.4	13	133.1*	14.8	39.2	36	144.9
August	69.6	19.6	26.9	11.4	60.4	39.9*	15.4	0.2	45.4	19.7
September	166.4	69.6	112.3	46.5	53.6*	54.2*	55	7.2	43	26.1
October	76.2	73.6	55.4	46	47.5*	21.4*	5.8	13.4	35.7	9.4
November	143	125.4	119.5	127.3	36.0*	42.8*	21.3	11.7	15.3	51.4
December	167.4	86.8	177	62.1	6.5*	46.7*	11.2	4.2	41.6	13.4
Total	M	M	917	M	M	M	277.6	M	345.8	M

Source: Environment Canada http://climate.weatheroffice.gc.ca/advanceSearch/eachHistoricData_e.html

M Missing, therefore incomplete data

* The value displayed is based on incomplete data

► B.C. AGRICULTURAL LAND MANAGEMENT PRACTICES, 2011

Land Usage Type	Farms Reporting	Hectares
Total number of farms	19,759	2,611,382
Weed control on summerfallow land, chemical only	45	1,059
Weed control on summerfallow land, tillage only	488	12,017
Weed control on summerfallow land, tillage and chemical combination	115	4,760
Use of herbicides	4,209	172,607
Use of insecticides	2,310	41,480
Use of fungicides	2,125	28,632
Use of commercial fertilizer	6,543	301,089
Use of lime	1,184	7,464
Soil conservation – crop rotation	4,257	na
Soil conservation – rotational grazing	5,443	na
Soil conservation – winter cover crops	1,601	na
Soil conservation – plowing down green crops	1,955	na
Soil conservation – buffer zones around water bodies	3,167	na
Soil conservation – windbreaks or shelterbelts	3,858	na
Total land prepared for seeding	6,055	223,136
Tillage incorporating most crop residue into soil	3,727	88,076
Tillage retaining most crop residue on the surface	1,296	71,594
No-till or zero-till seeding	1,548	63,106
Total use of irrigation	7,304	111,139
Irrigated field crops	628	11,485
Irrigated hay and pasture	3,005	73,128
Irrigated vegetables	1,183	4,287
Irrigated fruit	3,164	19,456
Other irrigated areas	657	2,783

Source: Statistics Canada. Census of Agriculture 2011

na – not applicable

► AGE OF B.C. FARM OPERATORS AT CENSUS 2011

	Under 35 years	35 to 54 years	55 years and over	Total
British Columbia	1,620	12,110	16,195	29,925
Percent of Total	5.4%	40.5%	54.1%	100%
Canada	24,120	127,895	141,920	293,925
Percent of Total	8.2%	43.5%	48.3%	100%

Source: Statistics Canada, Census of Agriculture 2011.

Note: Figures may not add to totals due to rounding.

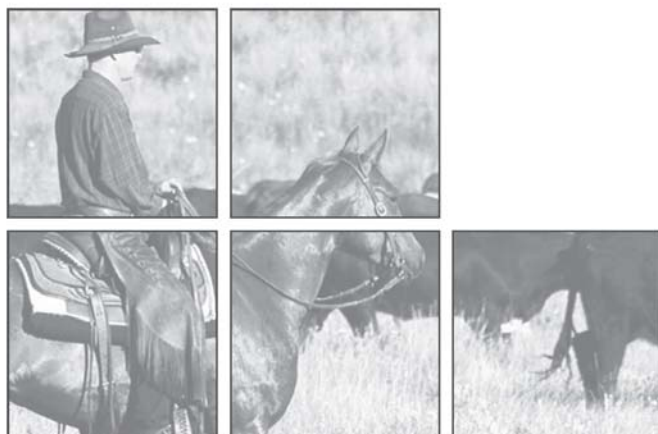
► FIELD CROP PRODUCTION IN B.C.

Crop	Area Harvested		Yield		Production	
	('000 hectares)		(kg/ha)		('000 tonnes)	
	2010	2011	2010	2011	2010	2011
Spring Wheat	23.8	29.5	1,800	3,800	43.7	112.9
Oats	17	24.3	1,900	3,100	32	74.6
Barley	15.8	19.4	1,900	2,900	30.2	56.6
Rye*	0	0	0	0	0	0
Canola	36	34.4	1,000	1,600	35.2	56
Mixed Grains*	0	0	0	0	0	0
Tame Hay	384.5	372.3	4,000	4,810	1,555.8	1,791.7
Fodder Corn	6.1	8.9	48,300	43,830	294.8	390.1
Dry Peas*	0	0	0	0	0	0

Source: Adapted in part from Statistics Canada Catalogue 22-002 June 2012

CANSIM Table 001-0010 Estimated areas, yield, production and average farm price of principal field crops

* Any crops harvested as forage or green silage are not included in reported crop production



► LIVESTOCK ON B.C. FARMS

('000 head)	At Jan 1/06	At Jan 1/07	At Jan 1/08	At Jan 1/09	At Jan 1/10	At Jan 1/11	At Jan 1/12
Bulls, One year and older	16.0	14.5	14.5	13.0	12.0	12.0	12.0
Milk Cows	75.0	70.5	70.0	71.1	71.1	70.5	71.5
Milk Heifers	30.0	32.0	35.0	32.0	33.4	35.0	36.0
Beef Cows	285.0	260.5	249.0	212.0	197.0	192.0	195.0
Beef Heifers – breeding	35.0	30.0	32.0	28.0	27.5	28.0	31.5
Beef Heifers – slaughter	15.0	12.0	14.5	12.0	8.0	8.5	10.5
Steers, One Year and Over	30.0	30.0	23.0	23.0	16.0	21.0	25.0
Calves	174.0	165.5	172.0	163.9	154.0	153.0	158.5
Total Cattle and Calves	660.0	615.0	610.0	555.0	519.0	520.0	540.0
Sows and Bred Gilts	18.1	17.7	17.4	16.5	11.9	8.5	9.4
Boars, Six Months and Over	0.6	0.6	0.5	0.4	0.3	0.2	0.4
Pigs under 20kg	39.1	43.7	38.4	37.9	38.9	23.7	24.0
Pigs 20 – 60 kg	39.1	32.2	37.7	27.0	24.8	22.3	24.2
Over 60 kg	43.1	36.8	28.0	34.2	24.1	24.3	31.0
Total Pigs	140.0	131.0	122.0	116.0	100.0	79.0	89.0
Rams	2.1	2.1	1.6	1.7	1.5	1.5	1.5
Ewes	32.0	29.9	25.6	27.5	26.1	25.7	26.0
Replacement Lambs	8.7	8.5	6.4	7.2	5.4	5.4	5.7
Market Lambs	21.2	13.5	11.4	12.6	12.0	11.9	11.8
Total Sheep and Lambs	64.0	54.0	45.0	49.0	45.0	44.5	45.0

('000 head)	At Dec 31/05	At Dec 31/06	At Dec 31/07	At Dec 31/08	At Dec 31/09	At Dec 31/10	At Dec 31/11
Bison¹	14.4	8.6	10.4	10.4	5.9	5.1	6.3
Fallow Deer¹	3.8	3.8	3.0	3.0	1.0	0.8	0.8

Source: Statistics Canada. Catalogues 23-012; 23-010 and 23-011, unless otherwise specified.

1 B.C. Ministry of Agriculture, Animal Health Branch.



► PRODUCTION OF SELECTED B.C. FRUITS AND VEGETABLES

	2007	2008	2009	2010	2011
Tree Fruits (tonnes)					
Apples	77,111	106,367	93,259	92,146	96,614
Cherries, sweet	7,382	5,965	13,782	9,091	9,370
Pears	4,926	4,899	4,372	4,436	4,647
Peaches	6,407	4,400	3,744	4,755	4,057
Plums and prunes	962	1,002	853	926	1,051
Nectarines	794	844	674	1,023	806
Apricots	708	937	755	514	365
Cherries, sour	238	F	F	114	x
Berries and Grapes (tonnes)					
Blueberries	33,466	30,844	40,075	40,823	51,343
Cranberries	36,287	31,445	37,421	29,838	27,414
Grapes	14,885	15,252	16,264	17,472	19,998
Raspberries	10,591	10,111	10,565	9,929	10,236
Strawberries	1,520	1,526	1,353	1,871	1,770
Field Vegetables (tonnes)					
Potatoes	108,864	105,462	92,081	47,628	78,609
Mushrooms ²	28,580	31,750	31,751	33,571	32,810
Pumpkins	6,577	4,990	8,148	8,400	8,512
Carrots	6,985	10,020	F	5,890	7,057
Lettuce	3,674	4,064	6,765	9,728	6,036
Corn	10,659	10,750	6,167	5,201	4,936
Dry onions	2,948	1,860	F	x	3,537
Beans	8,199	6,831	6,426	4,486	3,259
Broccoli	1,746	1,622	1,600	1,138	1,662
Tomatoes	1,451	1,179	1,187	1,593	1,626
Peas	3,084	3,270	2,448	1,974	1,220
Cucumbers	748	454	882	588	513
Cauliflower	277	390	F	x	484
Asparagus	75	91	F	F	165
Greenhouse Vegetables (tonnes)					
Greenhouse tomatoes	42,864	53,742	59,442	62,054	64,130
Greenhouse cucumbers ¹	26,535	29,339	61,738	F	33,953
Greenhouse peppers	27,216	28,462	27,987	29,838	29,513

Source: Statistics Canada, CANSIM Tables 001-0048, 001-0049, 001-0060.

¹ Tonnage based on conversion of 1 dozen cucumbers equates to approx. 13 pounds.

² Estimated by B.C. Ministry of Agriculture. Statistics Canada has terminated published estimates for B.C. and replaced with aggregate estimate for Western provinces only.

x Suppressed to meet the confidentiality requirements of the Statistics Act

F too unreliable to be published

► SELECTED B.C. FLORICULTURE, NURSERY AND SOD PRODUCTION

	2008	2009	2010	2011
Number of Greenhouse Flowers and Plants ('000)				
Total cut flowers ¹	83,878	88,019	95,610	91,239
Total potted plants ¹	35,380	35,397	38,569	44,242
Total cuttings ²	F	33,785	35,733	29,583
Tree seedlings greenhouse production	70,250	70,228	F	23,528
Bedding plants, ornamental	78,837	30,827	41,023	38,544
Bedding plants, vegetables	37,193	F	F	43,549
Number of Field Grown Nursery Products ('000)				
Shade or ornamental trees	x	F	F	5,527 ^E
Other trees and plants	F	F	F	150 ^E
Coniferous trees	1,963 ^E	2,316 ^E	F	2,722
Coniferous evergreen shrubs	520	538 ^E	F	798
Deciduous shrubs (including roses)	602 ^E	F	F	193
Containers of Grown Nursery Products				
Nursery tree seedlings	55,618 ^E	F	F	200,262 ^E
Perennials and annuals	5,784	F	6,104 ^E	6,890
Deciduous shrubs (including roses)	2,248	2,921	3,839	3,284
Coniferous evergreen shrubs	5,131 ^E	2,037 ^E	2,037	2,400
Evergreen broadleaf shrubs	750	1,993	1,719	1,991
Small fruit bushes	F	F	F	853
Vines	F	350 ^E	425	504
Coniferous trees	F	F	F	378
Other trees and plants	F	346 ^E	F	336 ^E
Fruit trees	F	F	F	231 ^E
Sod Area Grown for Sale (acres)	970	980 ^E	1,075 ^E	1,250 ^E

Source: Statistics Canada, CANSIM Tables 001-0048, 001-0049, 001-0060.

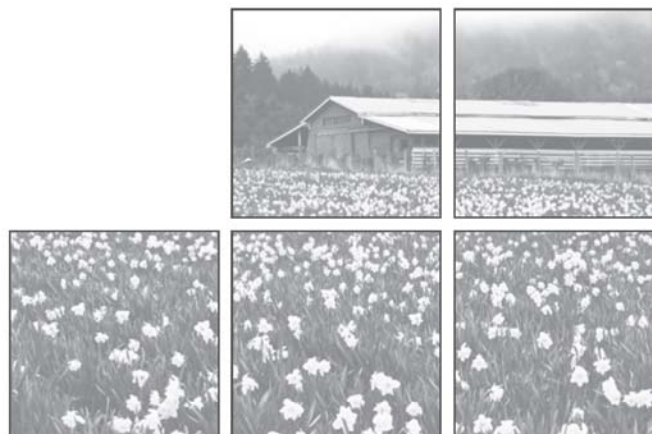
1 Includes flowers grown, or given some cultural treatment, and sold.

2 Total cuttings includes: Chrysanthemums, Poinsettias, Geraniums, Impatiens, and others.

x Suppressed to meet the confidentiality requirements of the Statistics Act

E use with caution

F too unreliable to be published



► B.C. LIVESTOCK PRODUCTION FOR CONSUMPTION

Total Slaughter (Heads) ¹	2009	2010	2011
Cattle	25,700	35,600	42,100
Calves	2,600	2,500	2,500
Hogs	232,300	207,800	181,900
Sheep and Lambs	79,100	76,500	76,300

Sources: Statistics Canada Catalogues 23-010, 23-011 and 23-012; and Statistics Canada Livestock Division

¹ Includes Federal/Provincial inspected slaughter, other commercial slaughter and on farm slaughter

► B.C. MILK PRODUCTION

('000 Litres)	2008	2009	2010	2011
Fluid Milk Production	375,766	376,773	373,384	358,554
Industrial Milk Production	284,295	281,738	283,296	315,655
Total Production	660,059	658,510	656,679	674,208

Sources: Statistics Canada. Table 003-0011 — Milk production and utilization, monthly (kilolitres), CANSIM (database); and BC Milk Marketing Board.

► B.C. POULTRY AND EGG PRODUCTION

	2010	2011
Poultry Meat Production ('000 kg)		
Chicken	155,945	158,379
Turkey	20,957	20,272
Total Production	176,902r	178,650
Egg Production ('000 doz)**	76,511	78,211

Source: Statistics Canada's Poultry and Egg Statistics Catalogue 23-015-XWE

** Includes eggs consumed for home use, eggs sold for hatching and the reduction for leakers and rejects

► B.C. HONEY PRODUCTION

	2007	2008	2009	2010	2011
Number of Beekeepers	1,907	1,848	1,742	1,916	1,938
Number of Colonies	45,649	36,574	41,108	41,936	38,159
Winter Mortality (%)	32	36	22	28	28
Average Yield per Colony (lbs/Col)	50	47	63	47	48
Total Production Yield ('000 lb)	2,276	1,730	2,590	1,988	1,825
Value ('000)	\$6,209	\$5,779	\$7,544	\$6,834	\$6,774

Source: B.C. Ministry of Agriculture, Feb 2012

Long term average honey yield/col. = 69 lbs.

► B.C. AQUACULTURE PRODUCTION

(Tonnes)	2008r	2009r	2010r	2011p
Salmon	81,406	76,291	78,701	83,200
Trout	705	581	667	700
Total finfish	82,111	76,872	79,368	83,900
Clams	1,305	1,359	1,485	1,300
Oysters	5,670	5,735	7,550	7,500
Mussels	285	312	364	300
Scallops	276	385	695	300
Total shellfish	7,536	7,791	10,094	9,400
Other	1,803	1,462	2,121	500
Total	91,450	86,125	91,582	93,800

Source: B.C. Ministry of Agriculture, May 2012

p data are preliminary

r data are revised

Finfish are in round weights; Shellfish are in-shell weights; Other are round weights.

Other includes Sablefish, Sturgeon, Tilapia, Abalone, Marine micro-algae, Sea cucumbers.

► NUMBER OF ORGANIC FARMS IN B.C.

Organic Products*	2006	2011
Farms reporting Certified	452	470
Farms reporting in Transition	73	113
Farms reporting Uncertified	2,767	—
Total Farms Reporting	3,232	—
Fruits, vegetables or greenhouse products		
Farms reporting Certified	358	330
Farms reporting in Transition	48	75
Farms reporting Uncertified	999	—
Total Farms Reporting	1,382	—
Field crops (grains, oilseeds, etc.)		
Farms reporting Certified	110	123
Farms reporting in Transition	23	26
Farms reporting Uncertified	753	—
Farms Reporting	880	—
Animals or animal products (meat, milk, eggs, etc.)		
Farms reporting Certified	86	107
Farms reporting in Transition	12	34
Farms reporting Uncertified	1,720	—
Farms Reporting	1,817	—
Other (maple syrup, herbs, etc.)		
Farms reporting Certified	63	—
Farms reporting in Transition	8	—
Farms reporting Uncertified	264	—
Total Farms Reporting	333	—

Source: Statistics Canada. Census of Agriculture, 2006 and 2011.

* The total number of farms reporting organic products for sale does not equal the sum of the parts because a farm could report more than one category.

Note that in Census 2006, producers were asked to identify commodities grown that were certified, in transition, or uncertified; and in Census 2011, producers were asked to report only those products that were certified or in transition to be certified organic production.

► AVERAGE PRICES RECEIVED BY B.C. PRODUCERS

	2009	2010	2011
Tree Fruits (\$/kg)¹			
Cherries-Sweet	2.65	3.56	3.29
Apricots	1.29	1.3	1.37
Peaches	0.9	1.04	1.24
Pears	0.35	0.67	0.54
Apples	0.39	0.34	0.39
Berries and Grapes (\$/kg)¹			
Strawberries	3.06	3.22	3.21
Blueberries	1.31	2.02	2.06
Grapes	2.22	1.95	1.97
Raspberries	1.77	1.74	1.54
Cranberries	1.27	1.37	1.37
Vegetables (\$/kg)¹			
Asparagus	F	F	4.46
Tomatoes (field)	1.17	1.2	1.31
Cauliflower	F	s/F	1.27
Broccoli	0.9	1.12	1.11
Beans	0.88	0.88	0.98
Peas, green	0.77	0.75	0.97
Corn	0.93	1.06	0.95
Lettuce, Head	0.8	0.87	0.94
Carrots, Bunched	F	0.61	0.63
Onions, (dry bulb)	F	s/r/F	0.48
Mushrooms ²	2.64	2.46	n/a
Potatoes	0.47	0.47	n/a
Livestock (\$/cwt)³:			
Lambs (A&B lambs 95-115lbs) ⁴	124.16	134.14	172.06
Feeder Steers (501-600 lb)	107.6	116.4	146.86
Feeder Heifers (501-600 lb)	96.01	104.86	134.37
Feeder Steers (801-900 lb)	91.6	96.8	118.95
Feeder Heifers (800-900 lb)	83.75	88.77	111.09
Bulls	53.31	64.66	77.57
D1,2 Cows	44.29	53.49	67.06
Hogs ⁵	52.71	58.26	65.35
Dairy Average Milk Price (\$/litre) ⁶	0.75	0.75	0.78

	2009	2010	2011
Poultry (\$/kg)⁷:			
Live Turkey (Over 10.8kg but not more than 13.3kg)	1.9	1.79	1.95
Live Turkey (Over 13.3kg)	1.87	1.76	1.92
Live Turkey (Over 6.2kg but not more than 8.5kg)	1.84	1.75	1.91
Live Turkey (Over 8.5kg but not more than 10.8kg)	1.84	1.75	1.91
Live Turkey (6.2kg and under)	1.86	1.77	1.9
Live Chicken (more than 2.7kg)	1.55	1.5	1.7
Live Chicken (1.4kg to 2.7kg)	1.52	1.47	1.67
Live Chicken (less than 1.4kg)	1.51	1.45	1.65
Eggs (\$/doz) – Average price ⁸	1.25	1.23	1.33

1 Statistics Canada Catalogues 22-003 and 22-008, unless otherwise noted.

2 From 2008, Mushroom data for the Prairie provinces and B.C. were discontinued and amalgamated under Western provinces.

3 Canfax 2006 Annual Report, unless otherwise specified.

4 Statistics Canada Catalogue 23-011. Weighted average price.

5 Statistics Canada Catalogue 23-010. Weighted average prices at Toronto.

6 B.C. Milk Marketing Board Statistics 2005 and 2006.

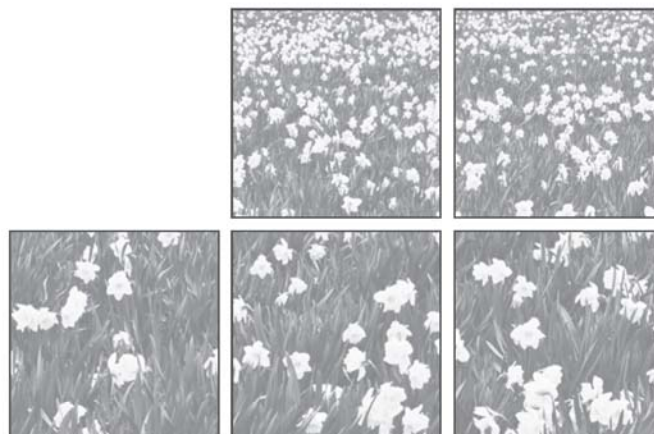
7 Agriculture & Agrifood Canada Poultry Marketplace. Vancouver annual average prices.

8 Statistics Canada Catalogue 23-015. Market price for all grades.

F too unreliable to publish

s confidential

r revised



► AVERAGE PRICES RECEIVED BY B.C. GRAIN AND OILSEED PRODUCERS

(\$/Tonne)	2007	2008	2009	2010	2011
Wheat ¹	127.32	198.59	156.45	110.66	166.65
Barley ¹	74.02	155.87	55.09	43.35	107.17
Oats	157.26	184.99	167.52	152.52	202.11
Canola	372.56	492.80	437.93	416.96	530.20

Source: Statistics Canada. Table 002-0043 – Farm product prices, crops and livestock, monthly (dollars per metric tonne unless otherwise noted), CANSIM (database).

¹ British Columbia; excluding payments made for initial price increases, interim and final payments made by the Canadian Wheat Board.

► AVERAGE PRICES RECEIVED BY B.C. AQUACULTURE PRODUCERS

(\$/Kg)	2007	2008r	2009r	2010r	2011p
Finfish					
Salmon	4.87	5.03	5.17	6.35	5.23
Trout	4.28	4.20	5.07	7.27	8.14
Shellfish					
Clams	5.62	5.53	5.45	5.49	5.54
Mussels	4.28	4.49	4.45	4.97	5.00
Oysters	1.15	1.15	1.23	1.19	1.23
Scallops	5.59	4.23	4.28	4.18	5.67

Source: B.C. Ministry of Agriculture, May 2012

p data are preliminary

r data are revised

► B.C. AGRIFOOD PRICE INDEX

	2007	2008	2009	2010	2011
Farm Input Price Index B.C. (index, 2002=100)	120.0	131.1	125.6	124.9	133.7
Farm Product Price Index B.C. (1997=100)	105.8	112.3	108.9	113.6	121
CPI: BC					
All Items	110	112.3	112.3	113.8	116.5
Food	109.3	112.9	117.7	119.6	124.6
Food in Stores	107.8	111.8	117.5	117.7	122.0
Food in Restaurants	112.2	115.1	118.2	123.2	129.5
Fish, seafood and other marine products	97.3	97.0	105.1	105.9	105.5

Sources: Statistics Canada, Cansim Tables 326-0020, 328-0015, 002-0021, 0021-0022 and 0023

► B.C. FARM PRODUCT PRICE INDEX

(1997=100)	2007	2008	2009	2010	2011
Grains	170.2	185.9	129.5	137.5	137.4
Oilseeds	107.1	128.5	115.6	123.3	142.6
Specialty Crops	98.4	158.3	114.3	99.5	143.6
Fruit	108.7	117.1	98.6	109.5	109.8
Vegetables (excl. potatoes)	95.0	99.8	99.2	101.6	99.9
Potatoes	143.7	136	143.4	145.1	148.2
Total Crops	102.9	109.1	100.8	106.4	105.7
Cattle And Calves	101.3	96.9	97.7	114.5	137.2
Hogs	83.4	82.1	80.1	87.7	99.6
Poultry	97.9	111.4	113	108.8	123.1
Eggs	103.4	119.0	119.1	116.4	125.6
Dairy	123.2	131.0	134.4	134.8	139.0
Total Livestock and Animal Products	107.7	114.5	115.9	119.4	132.1
Total Index	105.8	112.3	108.9	113.5	119.6

Source: Statistics Canada, Farm product price index (FPPI), annual (index, 1997=100), CANSIM Table 002-0022, April 2012



► FARM CASH RECEIPTS FOR B.C. AGRICULTURE

	(A)	(B)	(C)	(B)/(A)	(B)/(C)
(\$'000)	2010	2011	5 yr avg 2006–2010	2010 vs 2011 % Change	2010 vs 5 yr avg % Change
Greenhouse Vegetables	252,466	264,816	226,721	4.9%	16.8%
Floriculture	238,381	245,784	245,675	3.1%	0.0%
Berries and Grapes	186,642	207,738	165,213	11.3%	25.7%
Field Vegetables	176,307	177,151	178,375	0.5%	-0.7%
Nursery	171,242	160,043	148,807	-6.5%	7.6%
Tree Fruits	76,445	75,174	79,221	-1.7%	-5.1%
Other Crops	70,476	59,430	67,108	-15.7%	-11.4%
Grains and Oilseeds	31,512	35,980	31,156	14.2%	15.5%
Total Crops	1,203,471	1,226,116	1,142,276	1.9%	7.3%
Dairy Products	494,019	522,770	461,989	5.8%	13.2%
Poultry and Eggs	439,315	498,967	421,916	13.6%	18.3%
Cattle and Calves	203,181	206,011	239,730	1.4%	-14.1%
Other Livestock	46,127	55,175	46,506	19.6%	18.6%
Hogs	30,118	28,359	33,282	-5.8%	-14.8%
Sheep & Lambs	9,139	14,708	8,997	60.9%	63.5%
Honey	7,083	6,795	7,013	-4.1%	-3.1%
Total Livestock	1,228,982	1,332,785	1,219,434	8.4%	9.3%
Ag Income Stability Payments	50,910	51,948	72,615	2.0%	-28.5%
Crop Insurance	27,727	11,738	21,483	-57.7%	-45.4%
Other Direct Payments	2,927	1,997	5,450	-31.8%	-63.4%
Total Payments	81,564	65,683	99,548	-19.5%	-34.0%
Total Agriculture Receipts	2,514,017	2,624,583	2,460,212	4.4%	6.7%

Source: Statistics Canada, Cansim Table 002-0001 (Accessed June 8, 2012).

► FARM GATE RECEIPTS FOR B.C. AQUACULTURE

	(A)	(B)	(C)	(B)/(A)	(B)/(C)
(\$'000)	2010	2011	5 yr avg 2006–2010	2011 vs 2010 % Change	2011 vs 5 yr avg % Change
Salmon	499,700	435,300	418,927	-12.9	3.9
Trout	4,800	5,700	2,705	18.8	110.7
Total finfish	504,500	441,000	421,632	-12.6	4.6
Clams	8,100	7,200	8,065	-11.1	-10.7
Oysters	9,000	9,200	7,858	2.2	17.1
Mussels	300	1,500	1,314	400.0	14.2
Scallops	700	1,700	948	142.9	79.2
Total shellfish	18,100	19,600	18,185	8.3	7.8
Other	16,000	4,800	7,236	-70.0	-33.7
Total	538,600	465,400	447,052	-13.6	4.1

Source: Statistics Canada, Cansim Table 003-0001

(Accessed June 8, 2012 and 2011 Seafood Industry Year in Review)

r data are revised

p data are preliminary

► NET AGRICULTURAL FARM INCOME IN B.C.

	(A)	(B)	(C)	(B)/(A)	(B)/(C)
(\$'000)	2010	2011	5 yr avg 2006–2010	2011 vs 2010 % Change	2011 vs 5 yr avg % Change
Crop Receipts	1,224,234	1,237,250	1,146,429	1.1%	7.9%
Livestock Receipts	1,228,297	1,332,655	1,219,297	8.5%	9.3%
Program Receipts	81,564	65,683	99,548	-19.5%	-34.0%
Total Farm Cash Receipts	2,534,095	2,635,588	2,465,273	4.0%	6.9%
Total Operating Expenses	2,267,615	2,389,512	2,251,864	5.4%	6.1%
Net Cash Income	266,480	246,076	213,409	-7.7%	15.3%
Total Income-in-Kind	4,060	4,678	3,550	15.2%	31.8%
Total Depreciation	317,890	332,684	314,697	4.7%	5.7%
Realized Net Income	-47,350	-81,930	-97,738	-73.0%	16.2%
Value of Inventory Change	na*	na*	na*	na*	na*
Total Net Income	na*	na*	na*	na*	na*

Source: Adapted from Statistics Canada, Cansim Tables 002-0001, 002-0005, and 002-0012

* Effective May 2012, Statistics Canada is releasing Value of Inventory Change and Total Net Farm Income estimates once a year, in November only.

► B.C. AGRICULTURAL FARM OPERATING EXPENSES AND DEPRECIATION CHARGES

	(A)	(B)	(C)	(B)/(A)	(B)/(C)
(\$'000)	2010	2011	5 yr avg 2006–2010	2011 vs 2010 % Change	2011 vs 5 yr avg % Change
Property Taxes	23,310	24,382	22,585	4.6%	8.0%
Rent	64,275	65,459	59,834	1.8%	9.4%
Cash Wages, Room and Board	529,685	534,981	511,106	1.0%	4.7%
Interest	159,359	161,733	176,839	1.5%	-8.5%
Repairs to Buildings & Fences	59,495	60,090	59,537	1.0%	0.9%
Electricity	51,628	54,467	48,437	5.5%	12.4%
Telephone	18,791	19,355	18,818	3.0%	2.9%
Fuel (Heating and Machinery)	155,358	172,850	164,938	11.3%	4.8%
Machinery Repairs	107,353	108,427	108,471	1.0%	0.0%
Business Insurance	43,953	45,272	43,151	3.0%	4.9%
Custom Work	110,708	113,919	103,616	2.9%	9.9%
Crop and Hail Insurance	5,950	2,433	5,215	-59.1%	-53.3%
Fertilizer and Lime	105,760	133,258	103,469	26.0%	28.8%
Pesticides	40,451	38,185	39,131	-5.6%	-2.4%
Commercial Seed	84,809	85,996	82,240	1.4%	4.6%
Irrigation	3,088	3,113	3,092	0.8%	0.7%
Twine, Wire and Containers	83,109	85,436	83,479	2.8%	2.3%
Commercial Feed	384,510	427,191	380,195	11.1%	12.4%
Livestock & Poultry Purchases	56,139	68,545	62,098	22.1%	10.4%
Veterinary fees	37,894	38,462	37,543	1.5%	2.4%
Other Expenses	141,993	145,958	138,071	2.8%	5.7%
Total Gross Operating Expenses	2,267,615	2,389,512	2,251,864	5.4%	6.1%
Building Depreciation	136,475	137,563	134,201	0.8%	2.5%
Machinery Depreciation	181,415	195,121	180,496	7.6%	8.1%
Total Depreciation	317,890	332,684	314,697	4.7%	5.7%
Total Operating Expenses and Depreciation	2,603,265	2,579,750	2,506,943	-0.9%	2.9%

Source: Statistics Canada Cansim Table 002-0005 (Accessed June 13, 2012).

► AVERAGE INCOME OF B.C. FARM OPERATORS¹, BY FARM TYPE, 2010

(\$'000)	Off-farm income	Net operating income	Total income
Poultry and egg production	100,641	71,338	171,979
Dairy cattle and milk production	41,714	98,582	140,296
Greenhouse, nursery and floriculture production	43,589	73,360	116,949
Potato farming	46,672	60,520	107,192
Hog and pig farming	56,330	27,472	83,801
Animal production	52,386	25,943	78,329
Oilseed and grain farming	54,220	19,844	74,064
Crop production	39,852	22,304	62,156
Fruit and tree nut farming	38,931	12,652	51,583
Other animal production	53,388	-3,185	50,203
Other crop farming	40,420	5,931	46,352
Beef cattle ranching and farming, including feedlots	39,989	1,844	41,832
Other vegetable (except potato) and melon farming	22,862	13,201	36,063

Source: Statistics Canada, Agriculture Division, Total Income of Farm Operators Data, June 2012.

1 Includes incorporated and unincorporated farms. Average income includes income before depreciation.

► AVERAGE ANNUAL OPERATING REVENUES AND ENERGY EXPENDITURES, BY FARM TYPE, 2010

Farm Type	Operating Revenues (\$)	Fuel (\$)	Utilities ¹ (\$)	Total Energy (\$)	Percent of Operating Revenue
Oilseed and Grain	202,696	14,770	3,684	18,454	9%
Potato	1,073,598	36,589	15,614	52,203	5%
Other Vegetable and Melon ²	232,834	7,682	5,847	13,529	6%
Fruit and Tree Nut	207,851	5,669	4,078	9,747	5%
Greenhouse, Nursery and Floriculture	1,088,865	11,938	73,895	85,833	8%
Other Crops	78,778	6,606	2,377	8,983	11%
Beef Cattle ²	126,746	8,441	2,595	11,036	9%
Dairy	1,144,660	22,442	18,814	41,256	4%
Hog and pigs	869,314	10,027	20,363	30,390	3%
Poultry and Eggs	934,301	6,699	27,681	34,380	4%
Other Animal production	98,885	4,783	2,855	7,638	8%
All Farms	351,395	8,560	11,651	20,211	6%

Source: Statistics Canada CANSIM Table 002-0044, (Accessed June 18, 2012)

1 All utilities including natural gas heating, electricity and telephone

2 Includes feedlots

► TOTAL B.C. AGRICULTURAL FARM DEBT OUTSTANDING

	(A)	(B)	(C)	(B)/(A)	(B)/(C)
(\$'000)	2010	2011	5yr Avg 2006-2010	2011 vs 2010 % Change	2011 vs 5 yr avg % Change
Chartered Banks	2,132,053	2,069,000	2,076,915	-3.00%	-0.40%
Federal Government agencies	1,956,057	2,131,158	1,486,811	9.00%	43.30%
Provincial Government agencies	103	90	512	-12.60%	-82.40%
Credit unions	249,813	258,201	255,227	3.40%	1.20%
Insurance, trust companies & other	50,264	51,849	47,011	3.20%	10.30%
Supply companies and private individuals	636,659	680,876	467,264	6.90%	45.70%
Advance Payment programs	14,578	13,863	14,794	-4.90%	-6.30%
Total Debt Outstanding	5,039,528	5,205,037	4,348,535	3.30%	19.70%

Source: Statistics Canada, Cansim Table 002-0008 (Accessed June 18, 2012)

► B.C. FOOD AND BEVERAGE PROCESSING SECTOR

	2006	2007	2008	2009	2010	2011
Employment						
Number of Employees	26,862	27,062	27,690 ¹	28,495	28,542	29,317
Average Weekly Earnings (\$/week) – Food	716	732	706	646	687	707
Average Weekly Earnings (\$/week) – Beverage	800	807	x	x	x	x
	2006	2007	2008	2009	2010	2011
Shipments (\$ millions)						
Total Food	5,507	5,469	5,494	5,801	5,997	6,301
Animal Food Products	451	464	494	472	472	499
Grains and Oilseed milling	x	153	x	x	x	x
Sugar and confectionary	x	259	252	286	278	253
Fruit and Vegetables	532	453	433	446	421	432
Dairy Products	1,003	1,146	X	X	X	X
Meat and Meat Products	1,405	1,421	1,527	1,595	1,637	1,753
Seafood Products	575	404	x	x	x	x
Bakeries & tortillas	483	434	494	584	625	656
Other Food Industries	635	736	784	835	933	1,006
Total Beverage and Tobacco	1,179	1,204	1,215	1,199	1,175	1,153
Soft drink and ice manufacturing	414	414	x	x	x	x
Breweries	483	495	568	584	551	498
Wineries	x	295	315	291	304	304
Distilleries	x	x	x	x	x	x
Total Food and Beverage	6,686	6,673	6,709	7,000	7,172	7,454

Source: Statistics Canada. SEPH. CANSIM Tables 281-0024, 281-0027 and 304-0015

x Suppressed to meet the confidentiality requirements of the Statistics Act

1 Due to confidentiality of the 2008 data, persons employed in the beverage and tobacco manufacturing sector are estimated, based on an average of the 2007 and 2009 published statistics.

Annual data for the Survey of Employment, Payroll and Hours (SEPH), is released at the end of March for the previous calendar year and is not subject to change.

► B.C. AGRIFOOD ESTABLISHMENTS BY INDUSTRY

	2008	2009	2010	2011
Primary Production:				
Crop Production	3,372	3,453	3,576	3,872
Animal Production (includes Aquaculture)	3,896	3,831	3,814	4,078
Support for Agriculture	642	648	689	684
Subtotal	7,910	7,932	8,079	8,634
Manufacturing:				
Food	1,127	1,136	1,133	1,084
Beverage	291	317	318	312
Tobacco	—	—	—	—
Leather and Allied	55	54	52	53
Pesticide, Herbicide & Farm Products	32	29	31	31
Subtotal	1,505	1,536	1,534	1,480
Wholesale Distributors:				
Farm Products	267	253	250	243
Food	1,632	1,643	1,618	1,566
Beverages	218	214	226	215
Tobacco	14	13	13	9
Agricultural Supplies	196	193	193	191
Subtotal	2,327	2,316	2,300	2,224
Retail:				
Food	3,935	3,916	3,902	3,892
Beverage	272	489	534	561
Florists	449	456	461	448
Restaurants and Food Service	10,994	11,186	11,562	11,515
Drinking Places	740	727	721	686
Subtotal	16,390	16,774	17,180	17,102
Total	28,132	28,558	29,093	29,440

Source: Statistics Canada, Location Counts by Province and Industry Groups. Prepared by B.C. STATS December 2011.

► B.C. FOOD, ALCOHOL & TOBACCO PURCHASES

(\$ million)	2004	2005	2006	2007	2008	2009	2010
Purchases by Residents:							
Food from Stores	8,645	9,047	9,045	9,763	10,454	10,382	10,057
Bulk & Other Food	183	184	175	222	200	219	na ¹
Alcoholic Beverages from Stores	723	811	764	828	880	900	na ¹
Tobacco	740	910	789	928	800	824	na ¹
Food from Restaurants	2,645	3,083	3,000	3,498	3,452	3,112	4,269
Alcoholic Beverages from Licensed Premises	248	329	292	369	339	335	na ¹
Alcoholic Beverages and Tobacco Products (new in 2010)							1,943
Subtotal²	13,184	14,363	14,065	15,609	16,125	15,772	16,268

Source: for years 2009 and prior: Adapted from Statistics Canada, CANSIM Tables 203-0002, 355-0005, and 203-0013.

Source: for years 2010: Adapted from Statistics Canada, CANSIM Tables 203-0021, 355-0005, and 203-0013 and Catalogue no. 98-310-XWE2011002.

¹ na – this data has been terminated: Due to changes in the methodology of the survey, Cansim Table 203-0002 was terminated and replaced by CANSIM table 203-0021 in 2010 and, as a result, some data series were terminated.

² The Subtotal in 2010 is not comparable with previous years due to changes in the methodology of the survey, wherein Cansim Table 203-0002 was terminated and replaced by CANSIM table 203-0021 in 2010.

► PER CAPITA CONSUMPTION OF SELECTED FOODS IN CANADA

	2006	2007	2008	2009	2010	2011
Red Meats						
Beef (kg)	13.06	13.39	12.84	12.50	12.18	12.06
Pork (kg)	9.69	10.37	9.80	9.66	8.96	8.60
Mutton and Lamb (kg)	0.46	0.48	0.46	0.46	0.42	0.41
Poultry and Eggs						
Chicken (kg)	11.28	11.33	11.37	11.22	11.23	11.23
Turkey (kg)	2.22	2.26	2.36	2.28	2.20	2.15
Eggs (dozen)	12.81	12.28	12.84	12.70	12.96	13.28
Fish (kg)						
Seafish, fresh and frozen (kg)	2.51	2.51	2.06	2.36	2.23	2.49
Seafish, processed (kg)	2.44	2.15	1.94	2.09	1.86	2.27
Shellfish total, fresh (kg)	1.22	1.02	0.90	0.97	0.98	0.98
Freshwater fish total, fresh (kg)	0.31	0.25	0.23	0.25	0.21	0.23
Dairy Products						
Milk – Standard (litres)	8.70	8.40	7.97	7.85	7.41	7.34
Milk – 2% (litres)	27.06	26.70	26.26	25.86	25.52	25.16
Milk – 1% (litres)	12.75	12.80	12.77	12.75	12.49	12.28
Milk – Skim (litres)	6.13	6.16	6.10	6.05	5.84	5.76
Cheddar Cheese (kg)	2.78	2.48	2.63	2.70	2.80	2.70
Yogurt (litres)	4.92	5.05	5.40	5.48	5.83	5.96
Cottage Cheese (kg)	0.60	0.64	0.63	0.55	0.54	0.52
Ice Cream (litres)	5.84	5.17	4.57	3.47	3.52	3.66
Fruit						
Apples – Fresh (kg)	7.34	6.81	7.04	7.65	7.19	7.23
Apple Juice (litres)	6.03	5.97	5.89	5.92	5.75	5.50
Blueberries – Fresh (kg)	0.51	0.52	0.54	0.78	0.91	1.07
Cranberries – Fresh (kg)	0.63	0.55	0.71	0.90	0.83	1.00
Vegetables						
Tomatoes (kg)	4.74	5.09	4.93	4.97	4.85	5.25
Mushrooms (kg)	1.15	1.10	1.30	1.04	0.98	1.03
Peppers (kg)	2.45	2.37	2.51	2.51	2.34	2.38
Potatoes, White (kg)	28.54	27.93	27.40	27.44	25.92	24.46
Beverages						
Beer (litres)	76.94	77.67	77.70	76.44	74.53	72.93
Wine (litres)	13.88	14.35	14.68	14.96	15.20	15.44
Soft Drinks (litres)	84.89	76.36	72.65	71.30	69.34	67.43

Source: Statistics Canada Cansim Tables 002-0010 and 002-0011

Note: Adjusted for retail, household, cooking and plate loss.

► CONTRIBUTION TO GDP, BY SECTOR

Contribution to GDP	Million Chained 2002 dollars ¹						
	2005	2006	2007	2008	2009	2010	2011
Primary Agriculture ²	999	1,006	1,060	999	963	1,089	1,066
Animal Aquaculture	62	72	74	77	67	67	62
Agri Support	125	105	107	101	111	108	122
Commercial Fishing ³	146	164	128	107	108	98	105
Food Manufacturing	1,483	1,490	1,511	1,510	1,531	1,658	1,701
Beverage Manufacturing	X	X	X	X	X	X	X
Soft Drink and Ice Manufacturing	94	152	157	X	134	99	96
Breweries	180	203	210	222	220	199	180
Wineries	X	X	143	174	151	146	151
Distilleries	X	X	X	0	X	X	X
Total Agrifoods GDP (estimated)⁴	3,089	3,192	3,388	3,190	3,284	3,463	3,482
Total B.C. GDP	141,339	146,762	150,874	151,695	148,300	153,085	157,525
	Percent of B.C. GDP						
Primary Agriculture	0.71	0.69	0.70	0.66	0.65	0.71	0.68
Animal Aquaculture	0.04	0.05	0.05	0.05	0.05	0.04	0.04
Agri Support	0.09	0.07	0.07	0.07	0.07	0.07	0.08
Commercial Fishing	0.10	0.11	0.08	0.07	0.07	0.06	0.07
Food Manufacturing	1.05	1.02	1.00	1.00	1.03	1.08	1.08
Beverage Manufacturing	X	X	X	X	X	X	X
Soft Drink and Ice Manufacturing	0.07	0.10	0.10	X	0.09	0.06	0.06
Breweries	0.13	0.14	0.14	0.15	0.15	0.13	0.11
Wineries	X	X	0.09	0.11	0.10	0.10	0.10
Distilleries	X	X	X	X	X	X	X
Sum of Total Percent Shares	2.2	2.2	2.2	2.1	2.2	2.3	2.2

Source: B.C. Stats adapted from: Statistics Canada, System of National Accounts – GDP by Industry.

¹ The process of chaining takes into account fluctuations in price which will occur over time. In addition, chaining preserves the original growth rates within sectors and industries of the economy.

² Includes Crop and Animal Production (NAICS 11A), less Animal Aquaculture (112500).

³ Estimated – based on GDP for Fishing, Hunting and Trapping (NAICS 114000).

⁴ Chained values are summed to establish best possible estimates for Total B.C. Agrifoods GDP, given the limited data available.

x Suppressed to meet confidentiality requirements of the Statistics Act.

► EXPORTS – B.C.'S FIVE TOP AGRIFOOD¹ MARKETS

(\$'000)		British Columbia		Canada
Rank	Country	2010	2011 ²	2011
1	U.S.	1,100,983	1,133,446	19,546,250
2	Japan	74,183	81,852	3,697,924
3	South Korea	25,130	42,463	2,708,355
4	China	38,199	39,019	475,658
5	Taiwan	26,308	33,962	1,029,581
Sub Total		1,264,804	1,330,743	27,457,768
All Countries³		1,430,800	1,529,268	40,301,209
Top 5 – % of Total Exports		88.4%	87.0%	68.1%

Source: Global Trade Atlas (April 2012)

1 Excluding Seafood.

2 Ranked by 2011 B.C. export value with Canada comparison for 2011.

3 Total B.C. export values have been reduced from \$1.61 to \$1.43 billion in 2010 and from \$1.62 billion to \$1.53 billion in 2010 to account for apparent discrepancies regarding exports of canola oil/oilcakes, raw hides/skins, tobacco, beef/tallow and soy beans that are under investigation by Statistics Canada.

► EXPORTS – B.C.'S FIVE TOP SEAFOOD MARKETS

(\$'000)		British Columbia		Canada
Rank	Country	2010	2011 ¹	2011
1	United States	534,299	517,664	2,523,132
2	China	80,060	109,361	355,399
3	Japan	171,094	108,755	251,861
4	Hong Kong	49,516	48,040	122,251
5	Russian Federation	20,093	27,069	109,173
Sub Total		855,062	810,889	3,361,816
All Countries		957,010	911,339	4,085,895
Top 5 – % of Total Exports		89.3%	89.0%	82.3%

Source: Global Trade Atlas (April 2012)

1 Ranked by 2011 B.C. export value with Canada comparison for 2011.

► EXPORTS – B.C. AGRIFOOD¹ EXPORTS TO ALL COUNTRIES

	British Columbia		Canada	
(\$'000 CDN)	2010	2011	2010	2011
Fruit & Nut Products	237,436	267,961	610,505	769,344
Baked Goods & Other Grain Preparations	176,647	169,201	2,393,406	2,488,060
Food Preparations for Manufacturing	122,587	141,304	758,717	797,679
Greenhouse Vegetables	132,164	138,949	618,006	590,438
Field Vegetables	85,657	91,270	3,602,913	3,786,447
Alfalfa, Fodder & Animal Feeds	84,278	78,901	562,821	607,600
Pork Products	56,925	73,169	2,654,920	3,066,462
Plants, Bulbs & Flowers	57,128	58,223	302,240	295,660
Chocolate & Cocoa Preparations	37,517	54,512	950,564	982,417
Industrial By Products & Residues	23,118	48,622	109,822	166,937
Water	30,658	45,248	122,491	141,419
Cattle and Calves	58,391	42,258	1,128,490	885,497
Milled Cereals & Milling Products	26,084	40,710	682,179	752,706
Fruit Syrups & Beverage Concentrates	35,490	35,700	71,570	85,944
Coffee, Tea & Spices	34,283	34,574	404,978	531,634
Poultry Products	30,487	34,444	333,712	334,181
Dairy Products	15,551	23,804	166,971	187,545
Grains & Cereals	20,951	22,298	5,624,742	6,880,793
Sugary & Sugar Confectionary	19,715	18,648	801,471	856,555
Beer & Cider	14,482	13,636	236,614	220,596
Oilseeds ²	12,575	11,274	5,185,927	6,326,734
Furskins	22,427	9,800	409,242	477,101
Fruit and Vegetable Juice	11,164	9,149	63,112	78,484
Vegetable Oil & Oilcakes ²	10,089	9,030	3,014,297	4,288,489
Horses	14,221	8,266	54,691	45,624
Other Plant Products	5,810	8,107	171,241	166,770
Other Animal Products	9,584	6,503	273,084	260,112
Wine	5,514	5,786	27,992	37,211
Condiments, Sauces, Seasonings & Soup	4,682	4,960	398,145	433,817
Other Meat Products	4,640	4,414	125,505	130,928
Other Non-Alcoholic Beverages	4,915	3,898	37,648	44,947
Vegetable Seeds for Sowing	3,033	2,415	92,434	107,613
Eggs	2,286	2,336	56,273	51,727
Other Agriculture Products	4,369	2,302	339,750	317,135
Hogs	2,531	1,619	37,213	44,475
Other Seeds for Sowing	2,177	1,615	171,568	215,076
Animal Fats ²	1,862	1,468	212,734	251,519
Distilled Spirits	1,432	989	394,264	425,272
Ice Cream & Edible Ice Products	135	830	72,328	71,508
Other Live Animals	529	622	55,224	53,567
Raw Hides & Skins ²	1,036	358	291,756	313,326
Spices	89	81	15,827	11,485
Live Poultry	953	12	388,879	382,692
Beef Products ²	5,199	0	1,432,464	1,337,685
Total Exports	1,430,800	1,529,268	35,458,730	40,301,209

Source: CATSNET Analytics, Statistics Canada (April 2012)

1 Excludes Seafood

2 B.C. data for Beef Products, Animal Fats, Oilseeds and Vegetable Oil/Oilcakes shown here has been revised downwards from raw data released by Statistics Canada to account for apparent discrepancies regarding province of origin. Ministry of Agriculture staff are working with Statistics Canada to investigate these discrepancies.

► EXPORTS – B.C. SEAFOOD EXPORTS TO ALL COUNTRIES

(\$'000 CDN)	British Columbia		Canada	
	2010	2011	2010	2011
Atlantic Salmon	320,731	313,836	520,098	479,370
Crabs	65,290	57,325	588,495	739,402
Hake	46,050	53,030	63,365	70,695
Shrimp & Prawns	30,636	51,134	371,736	394,071
Geoduck Clams	43,165	40,059	43,361	40,097
Sockeye Salmon	101,399	31,815	102,176	31,821
Chinook Salmon	26,987	29,240	26,990	29,256
Herring	48,112	29,017	138,522	125,907
Halibut	28,400	28,816	88,906	96,242
Pink Salmon	22,323	28,772	22,331	28,774
Sablefish	17,471	17,647	17,471	17,657
Tuna	21,815	17,447	31,730	26,105
Sardines	17,017	17,249	38,824	35,915
Sea Urchins	10,066	13,001	15,166	19,415
Chum Salmon	2,973	9,940	3,270	9,942
Oysters	7,493	9,019	13,400	15,719
Coho Salmon	6,318	7,263	6,320	7,276
Clams	8,273	6,612	63,586	58,143
Pollock	4,194	3,707	8,159	7,771
Flounder	1,176	3,262	19,161	13,332
Cod	3,564	3,102	56,772	49,243
Sole	1,667	2,485	5,426	5,265
Dogfish	4,504	2,165	4,690	2,350
Ocean Perch	1,479	1,489	8,032	10,559
Turbot	1,054	1,121	9,489	15,087
Trout	409	1,089	10,917	12,917
Lingcod	1,256	1,027	1,256	1,027
Scallops	549	421	95,724	112,942
Mussels	283	230	36,711	39,072
Marine Plants	1,416	198	11,967	11,762
Octopus	98	154	98	167
Smelt	0	118	5,852	6,357
Mackerel	31	56	43,053	20,347
Other Seafood Products	110,809	129,493	1,418,130	1,551,890
Total Exports	957,010	911,339	3,891,183	4,085,895

Source: CATSNET Analytics, Statistics Canada (October 2012)

► B.C.'S TOP 30 COMMODITIES

Ranking	Commodities	2011 B.C. Receipts (\$'000)	2011 Canada Receipts (\$'000)	B.C. Share of National (%)	B.C. Ranking in National
1	Dairy	522,770	5,815,137	9.0%	3
2	Farmed Salmon	435,300	606,775	71.7%	1
3	Chickens	351,128	2,260,116	15.5%	3
4	Floriculture	225,419	1,140,430	19.8%	2
5	Beef	206,181	6,449,116	3.2%	6
6	Nursery	165,167	501,800	32.9%	2
7	Tomatoes (Greenhouse)	115,712	495,932	23.3%	2
8	Blueberries	105,757	203,345	52.0%	1
9	Peppers (Greenhouse)	102,993	299,638	34.4%	2
10	Eggs – Total	102,013	789,967	12.9%	3
11	Mushrooms ¹	88,000	298,511	29.5%	2
12	Wild Salmon	46,215	46,215	100.0%	1
13	Turkeys	45,637	353,375	12.9%	3
14	Cranberries	39,772	88,093	45.1%	2
15	Grapes	39,333	112,452	35.0%	2
16	Greenhouse Cucumbers	39,115	278,705	14.0%	2
17	Halibut	36,951	57,465	64.3%	1
18	Clams/quahaug	35,073	77,439	45.3%	2
19	Apples	34,034	154,175	22.1%	3
20	Sweet Cherries	30,838	33,115	93.1%	1
21	Hogs	28,164	3,881,512	0.7%	6
22	Crab	26,979	413,301	6.5%	5
23	Potatoes	25,515	1,041,122	2.5%	8
24	Hay & Clover	22,695	250,258	9.1%	4
25	Tuna	21,563	29,970	71.9%	1
26	Farmed Shellfish	19,600	74,108	26.5%	2
27	Redfish	18,745	22,393	83.7%	1
28	Canola	17,809	7,342,436	0.2%	5
29	Forest Products (from Agricultural Farms)	15,953	109,377	14.60%	3
30	Raspberries	15,946	28,611	55.7%	1

Source: Adapted from: Statistics Canada, Agriculture Division, Farm Cash Receipts Unit; Statistics Canada Catalogues 21-011 and 23-222; Fisheries and Oceans Canada – Commercial Fisheries Landings, and B.C. Ministry of Agriculture, Aquaculture Statistics Section.

¹ Estimate based on information from Ministry of Agriculture's mushroom industry specialist, May 2012.

Note: In 2011, from the list of British Columbia's top 30 primary food sales, the province led the nation in receipts from farmed salmon, blueberries, wild salmon, halibut, sweet cherries, tuna, redfish and raspberries. The province ranked second to Ontario in farm receipts from floriculture products, nursery products, greenhouse tomatoes, greenhouse peppers, greenhouse cucumbers, mushrooms and grapes; second to Quebec in farm receipts from cranberries; second to Prince Edward Island in farm gate receipts from farmed shellfish, and second to Newfoundland in landed value of wild clams.

► CONTACT INFORMATION

*For more information on B.C. Agriculture,
Seafood and Agrifood, please contact:*

B.C. Ministry of Agriculture
PO Box 9120 STN PROV GOVT | Victoria, B.C. V8W 9B4

www.gov.bc.ca/agri

NOVEMBER 2012



**MINISTRY OF AGRICULTURE
KEY STAKEHOLDERS**

Government Stakeholders				
Organization	Executive/Contact	Address	Phone/fax	Email
Agriculture and Agri-Food Canada	Rodney Dlugos, Regional Director BC Regional Office	420 - 4321 Still Creek Drive Burnaby BC V5C 6S7	T 604 666-6344 F 604 666-7235	Rodney.Dlugos@agr.gc.ca
Canadian Food Inspection Agency	George Da Pont, President	1400 Merivale Rd Tower 1, Flr 6, Room 100 Ottawa, ON K1A 0Y9	T 613-773-6000 F 613-773-6060	George.DaPont@inspection.gc.ca
Fisheries and Oceans Canada	Sue Farlinger Regional Director General	401 Burrard St Vancouver BC V6C 3S4	T 604-666-6979	Susan.Farlinger@dfo.mpo.gc.ca
Major Stakeholder Groups & Umbrella Organizations				
BC Agriculture Council	Rhonda Driediger, Chair Reg Ens, Executive Director	230 - 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604-888-1685 F 604 888--1502 T 604 854-4454 F 604 854-4485 s.22	rhonda@driedigerfarms.com reg@bcac.bc.ca
BC Association of Agricultural Fairs and Exhibitions	Ann Siddall, President Janine Saw, Executive Director	18231 – 60 th Ave Surrey BC V3S 1V7	T 778 574-4082 F 778 574-4082 T 250-723-9648	s.22 jdsaw@bcfaairs.ca
BC Association of Cattle Feeders	Bill Freding, President Dimity Hammon, Executive Director	8495 - 800-15355 24 th Ave White Rock BC V4A 2H9	T 877 884-4391 F 604-608-3454	dimity@comcast.net

BC Association of Farmers' Markets	Jon Bell, President	103 – 1089 West Broadway Vancouver BC V6H 1E5	T 604 734-9797 F 604 568-4748	info@bcfarmersmarket.org
BC Cattlemen's Association (BCAC member)	David Haywood-Farmer, President Kevin Boon, General Manager	4 - 10145 Dallas Dr Kamloops BC V2C 6T4	T 250 573-3611 F 250 573-5155	bccattle@kamloops.net
BC Food Processors Association	Nico Human, Executive Director & CEO	35707 Sunridge Pl Abbotsford BC V3G 1E5	T 604 504-4409 F 604 746-4409	nico@bcfpa.ca
BC Fruit Growers' Association (BCAC member)	Jeet Dukhia, President	1473 Water St Kelowna BC V1Y 1J6	T 250-762-5226 F 250-861-9089	info@bcfga.com
BC Landscape & Nursery Association (BCAC member)	Lesley Tannen, CEO	102 - 5783 - 176A St Surrey BC V3S 6S6	T 604-575-3506 F 604 574-7773	ltannen@bclna.com
Cattle Industry Development Council	Linda Allison, Chair Thomas Wynker, Vice Chair	4 - 10145 Dallas Dr Kamloops BC V2C 6T4	T 250 573-3611 F 250 573-5155	cattlein@kamloops.net
Certified Organic Associations of BC (BCAC member)	Susan Snow, Co-President Rebecca Kneen, Co-President	202 - 3002 32nd Ave Vernon BC V1T 2L7	T 250 260-4429 F 250 260-4436	office@certifiedorganic.bc.ca
Investment Agriculture Foundation	Peter Levelton, Chair Peter Donkers, Executive Director	PO Box 8248 Victoria BC V8W 3R9	T 250 356-1662 F 250 953-5162	pdonkers@iafbca
Small Scale Food Processor Association (SSFPA)	Gerry Pattison, Chair Candice Appleby, Executive Director	2214 Sun Valley Dr Nanaimo BC V9T 6E8	T 866 547-7372 F 250 954-3723	info@ssfpa.net
United Flower Growers' Co-op Association (BCAC member)	Bob Pringle, CEO	4085 Marine Way Burnaby BC V5J 5E2	T 604-430-2211 F 604-430-3858	bpringle@ufgca.com

Industry Organizations - Agriculture				
Associated Ginseng Growers of BC	Doug Murdoch, President	1274 McGill Rd Kamloops BC V2C 6N6	T 250-851-2884 F 250-851-2881	majesticginseng@telus.net
BC Blueberry Council (BCAC member)	Mike Makara, Chair	275 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604 864-2117 F 604 864-2197	info@bcblueberry.com
BC Broiler Hatching Egg Producers Association (BCAC member)	Allan Cross, Chair/President	PO Box 191, Abbotsford BC V4X 3R2	P 604-864-7556 F 604-850-1683	association@bcbhec.com
BC Chicken Growers' Association (BCAC member)	Ravi Bathe, President Margret Duin, Association Administrator	PO Box 581 Abbotsford BC V2T 6Z8	T 604-859-9332 F 604-853-4808	bccga@telus.net
BC Chicken Marketing Board	Daphne Stancil, Chair Bill Vanderspek, GM	101 – 32450 Simon Avenue Abbotsford BC V2T 4J2	T 604 859-2868 F 604 859-2811	info@bcchicken.ca
BC Council of Marketing Boards	Derek Janzen, Chair Jack Wessel, Secretary	71 - 4001 Old Clayburn Rd Abbotsford BC V3G 1C5	T 604 302-1046 F 604-677-6058	s.22
BC Cranberry Growers Association (BCAC member)	Grant Keefer, Chair	21538 – 87B Ave Langley BC V1M 2E6	T 604 309-9868	info@bcccranberrygrowers.com
BC Cranberry Marketing Commission	Jack Brown, Chair Dianne Driessen, GM	PO Box 162, Stn A Abbotsford BC V2T 6Z5	T 604-897-9252 F 604-677-6058 Jack Brown's s.22	cranberries@telus.net s.22
BC Dairy Association (BCAC member)	David Taylor, President David Eto, CEO & Executive Director	3236 Beta Ave Burnaby BC V5G 4K4	T 604-294-3775 F 604-294-8199	contactus@bcdairy.ca
BC Egg Producers Association (BCAC member)	Dan Kampen, President	250 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 778-549-0780 F 604-556-3410	doubledfarms@shaw.ca
BC Forage Council	Doug Hatfield, President	300-640 Borland St Williams Lake BC V2G 4T1	T 250 267-6522	bcfc@bcforagecouncil.com

BC Grain Producers Association (BCAC member)	Robert Vander Linden President Irmgard (Irm) Critcher, Director	Box 6004 Fort St John BC V1J 4H6	T 250 785-5774 F 250 785-5713	irmi@bcgrain.com info@bcgrain.com nvlent@explornet.com
BC Grapegrowers' Association (BCAC member)	Manfred Freese, President Connie Bielert, Administrator	451 Atwood Rd Grand Forks BC V0H 1H9	T 877 762-4652 F 250-442-4076	bcga@nethop.net
BC Greenhouse Growers' Association (BCAC member)	Peter Cummings, President Linda Delli Santi, Executive Director	207-15252 32 nd Ave Surrey BC V3S 0R7	T 604 531-5262 F 604 542-9735	bcgga@bcgreenhouse.ca linda@bcgreenhouse.ca
BC Hog Marketing Commission	Gary Rolston, Chair Geraldine Auston, GM	PO Box 8000 – 280 Abbotsford BC V2S 6H1	T 604-897-9252 F 604 820-6647	info@bcpork.ca
BC Hot House Foods Inc.	Mike Reed, President	9087 – 198 St Building D, Unit 800 Langley BC V1M 3B1	T 604 881-4545 F 604 880-5551	info@bchothouse.com
BC Milk Marketing Board	James Byrne, Chair, Bob Ingratta, CEO	200 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604-556-3444 F 604-556-7717	info@milk-bc.com
BC Pork Producers Association (BCAC member)	Jack DeWit, Chair Geraldine Auston, General Manager	PO Box 8000 – 280 Abbotsford BC V2S 6H1	T 604 287-4647 F 604 820-6647	info@bcpork.ca
BC Potato & Vegetable Growers Association (BCAC member)	Bill Zylmans, Pres/Chair Leisa C. Yee, Administrator	Box 18565 Delta BC V4K 4V7	T 604 940-2024 F 604 940-2024	Lyee_pvg@telus.net
BC Poultry Association (BCAC member)	Ray Nickel, President	230 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604-625-6400	s.22
BC Turkey Growers' Association (BCAC member)	Steve Heppell, President	106 – 19329 Enterprise Way Surrey BC V3S 6J8	T 604 534-5644 F 604 534-3651	smallory@bcturkey.com
BC Vegetable Marketing	David Taylor, Chair	207– 15252 32 nd Ave	T 604 542-9734	tom@bcveg.com

Commission	Tom Demma, GM	Surrey BC V3S 0R7	F 604 542-9735	
BC Wine Grape Council (BCAC member)	Hans Buchler, Chair	PO Box 1218 Peachland BC V0H 1X0	T 250-767-2534 F 250-767-0094	bcwgc@telus.net hbuchler@vip.net
British Columbia Egg Marketing Board	Richard King, Chair Al Sakalauskas, Executive Director	250 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604 556-3348 F 604 556-3410	bcemb@bcegg.com
British Columbia Turkey Marketing Board	Ralph Payne, Chair Michel Benoit, GM	106-19329 Enterprise Way Surrey BC V3S 6J8	T 604 534-5644 F 604 534-3651	admin@bcturkey.com
Delta Farmers' Institute	David Ryall, President Leisa C. Yee Administrator	PO Box 18565 Delta BC V4K 4V7	T 604 940-2024 F 604 940-2024	s.22
F.A.R.M. Community Council (BCAC member)	Lynne Wilson, President	15695 Thompson Rd East Prince George BC V2K 5L2	T 250-967-4645	s.22
First Nations Agricultural Association	Chief Harold Aljam, President	PO Box 1186 Stn Main Kamloops BC V2C 6H3	T 778-469-5040 F 778-469-5030	info@fnala.com
Fraser Valley Cole Crop Growers' Association (BCAC member)	Mike Wallis, Manager	21538-878 Ave Langley BC V1M 2E6	T 604 309-9868	s.22
Fraser Valley Egg Producers' Association	Dan Kampen, President	250 – 32160 South Fraser Way Abbotsford BC V2T 1W5	s.22 F 604-556-3410	doubledfarms@shaw.ca
Fraser Valley Processing Peas, Bush Beans and Corn Growers' Association (BCAC member)	Brent Harris, President	c/o Brent Harris, President 6545 – 60 th Ave Delta BC V4K 4E2	T 604-946-2643 F 604-946-2603	Fraserland.farms@dccnet.com
Fraser Valley Strawberry Growers' Association (BCAC member)	Ed McKim, President Sharmin Gamiet, Association Manager	265 – 32160 South Fraser Way Abbotsford BC V2T 1W5	T 604 864-0565 F 604 864-0575	info@bcstrawberries.com
Horse Council BC (BCAC member)	Lisa Laycock, Executive Director Kelly Coughlin, Industry Manager	27336 Fraser Highway Aldergrove BC V4W 3N5	T 604 856-4304 F 604 856-4302	administration@hcbc.ca industry@hcbc.ca

Okanagan Kootenay Cherry Growers' Association (BCAC member)	Christine Dendy, Chair	PO Box 28100 RPO East Kelowna Kelowna BC V1W 4A6	T 250-860-3537 F 250-868-8979 s.22	s.22 bccherry@nethop.com
	Connie Bielert, Administrator	Box 2462 Stn R Kelowna BC V1X 6A5		
Raspberry Industry Development Council (BCAC member)	David Mutz, Chair Sharmin Garmiet, Executive Director	265 – 32160 South Fraser Way Abbotsford BC V2T 3K2	T 604 854-8010 F 604 854-6050	council@bcraspberries.com
Retail Council of Canada (formerly Canadian Council of Grocery Distributors)	Allen Langdon, Vice President, Sustainability	209 – 1730 West 2 nd Ave Vancouver BC V6J 1H6	T 604-730-5270 s.22	alangdon@retailcouncil.org

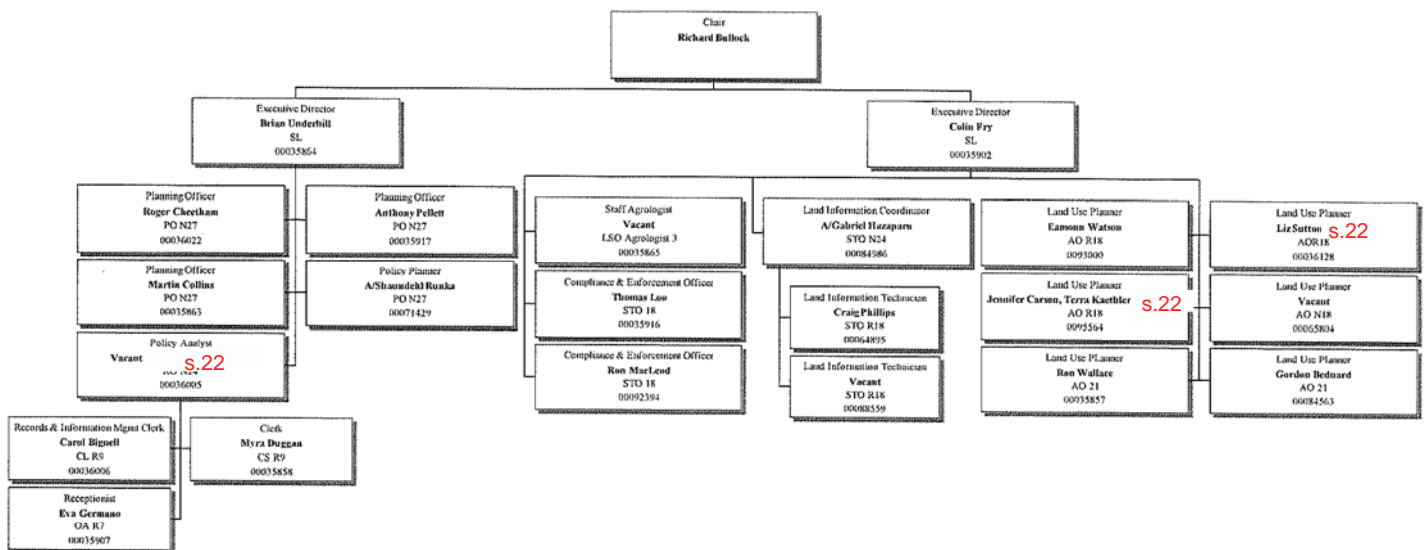
Industry Organizations – Aquaculture/Fisheries				
Aboriginal Aquaculture Association	Chief Richard Harry, Executive Director	1400B Drake Rd Campbell River BC V9W 6J3	T 250 286-9939 F 250 286-9931	richard@aboriginalaquaculture.com info@aboriginalaquaculture.com
BC Salmon Farmers Association	Vincent Erenst, Chair Mary Ellen Walling, Executive Director	201-909 Island Highway Campbell River BC V9W 2C2	T 250 286-1636	s.22
BC Seafood Alliance	Christopher Sporer, Chair Christina Burrige, Executive Director	1100-1200 West 73 rd Ave Vancouver BC V6P 6G5	T 604-377-9213 F 604-683-4510	s.22
BC Salmon Marketing Council	Chair: open Tony Berger, Vice-Chair Harriet Brooke, FAO Maurice Cardinal, BDCO	Box 28100 Westshore RPO Victoria BC V9B 6K8	C s.22 Toll-free 855- 642-3551 F 250-324-2232	info@bcsalmon.ca
BC Shellfish Growers' Association	Yves Perrault, President, Roberta Stevenson, Executive Director	Unit F 2002 Comox Ave Comox BC V9M 3M6	T 250 890-7561 F 250 890-7563	roberta@bcsga.ca livingwingfarm@telus.net
Coastal Alliance for Aquaculture Reform	Will Soltau, Contact	Living Oceans Society PO Box 320 Sointula BC V0N 3E0	T 250-973-6580 F 250-973-6581	wsoltau@livingoceans.org
Freshwater Aquaculture Association of British Columbia	Steve Atkinson, Chair	Taste of BC Aquafarms Inc. 2930 Jameson Rd Nanaimo, BC V9R 6W8	250-755-4077	steve@freshbcsalmon.com mailto:steve-atkinson@shaw.ca

Miscellaneous				
BC Farm Women's Network	Loretta Simpson, President	Box 584 Valemount BC V0E 2Z0	T 250 968-4453	s.22
BC Farm Writers Association	Tamara Leigh, President	8551 Chemainus Rd Chemainus BC V0R 1K5	T 778-232-4036	s.22
BC Food Protection Association	Alex Montgomery, President	5500 Woodpecker Dr Richmond BC V7E 5A8	T 604-816-7135	president@bcfpa.net
BC Food Technologists	Peter Taylor, Section Management Representative	8646 119 th St Delta BC V4C 7X8	T 604-209-2858	s.22
BC Institute of Agrologists	Rob Kapchanko, P.Ag, President Robert Moody, P.Ag, RPBio Executive Director/ Registrar	2777 Claude Road., Victoria BC V9B 3T7	T 250 380-9292 F 250-380-9233	p.ag@bcia.com
BC Restaurant & Foodservices Association (BCRFA)	Ian Tostenson President / CEO	2 – 2246 Spruce St Vancouver BC V6H 2P3	T 604-669-2239 s.22 F 604-669-6175	itostenson@bcrfa.com
Fraser Basin Council (FBC)	Charles Jago, Chair David Marshall, Executive Director	1 st Floor, 470 Granville St Vancouver BC V6C 1V5	T 604 488-5350 F 604-488-5351	info@fraserbasin.bc.ca dmarshall@fraserbasin.bc.ca
Farm and Ranch Safety and Health Association (FARSHA)	Ralph McGinn, Chair Bruce Johnson, Executive Director	311 - 9440-202 St Langley BC V1M 4A6	T 604 881-6078 F 604 881-6078	farmsafe@farsha.bc.ca
Educational Institutes				
College of Veterinarians of British Columbia	Dr. Tracy Cornish, President David Dewhirst, Vice	107 828 Harbourside Dr North Vancouver BC V7P 3R9	T 604 929-7090 F 604 929-7095	council@cvbc.ca

	President			
University of British Columbia	Murray Isman, Dean and Professor, Faculty of Land and Food Systems	248 H.R. MacMillan Building, 2357 Main Mall Vancouver BC V6T 1Z4	T 604 822-1219	Murray.isman@ubc.ca

December 2012

**Agricultural Land Commission
2012**





MINISTRY PROFILE

Ministry:

Agriculture

Ministry Mandate:

The Ministry of Agriculture supports an innovative, adaptive, globally competitive and socially and environmentally responsible agrifoods sector valued by all British Columbians. The Ministry's support of healthy and safe agrifood and seafood production and post-production processing provides new and value-added products for domestic and international markets, contributing to B.C. jobs and the economy as well as to diversified rural communities.

The Ministry champions the agrifoods sector by:

- Supporting practices that promote adaptable, sustainable and competitive agrifoods production;
- Ensuring, in partnership with the Ministry of Health and the Federal Government, a regulatory system that promotes animal and plant health and food safety;
- Delivering programs to stabilize farm incomes when threatened by circumstances beyond farmers' control to ensure continued long-term production;
- Providing guidance and funding to the sector to increase market development;
- Supporting the agricultural industry's contribution to the green economy;
- Working with other ministries, federal partners and other governments, stakeholders and industry to ensure sustainable marine fisheries;
- Working to balance urban / agricultural interests, and,
- Ensuring a safe, sustainable and cost-effective provincial meat inspection system for BC, including management of the inspection of provincially-licensed Class A and B abattoirs.

Budget:

Fiscal 2013/14: \$79,307,000

Full Time Equivalents (FTEs):

With the recent addition of 44 positions for the BC Meat Inspection Program, the current approved FTEs for Agriculture is 398. Year to date average burn for Ministry operations is: 289.93. Inclusive of Agricultural Land Commission, the average burn is: 312.04. The 44 positions added for the meat inspection program are included in the total FTE count but had no staff encumbering them and competitions for these positions are underway (making the average burn seem unreasonably low). See details on next page.

Core Ministry Programs

➤ Deputy Minister's Office (DMO):	5
○ Ministry Correspondence Unit	2
➤ Agriculture Science and Policy Division (ASP):	130
○ BC Meat Inspection Program	43
➤ Strategic Industry Partnerships Division (SIP):	183
Sub-Total	<u>363</u>

Minister's Office

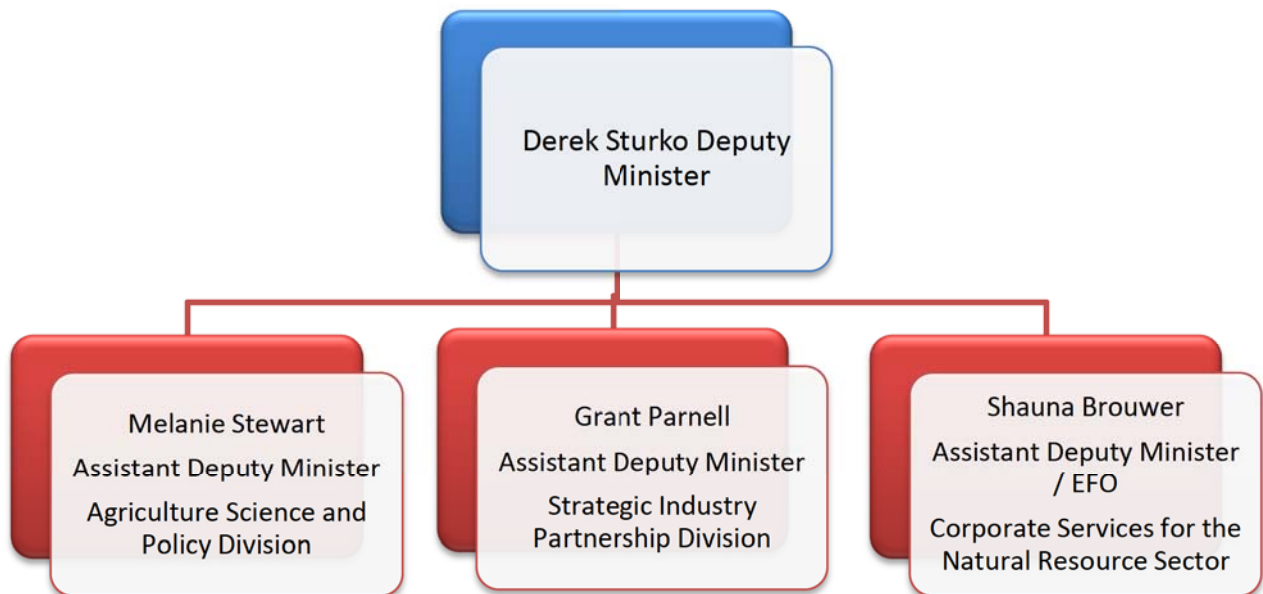
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Other Offices

➤ BC Farm Industry Review Board (BCFIRB):	9
➤ Agriculture Land Commission (ALC):	22
Sub-Total	<u>31</u>

Total	<u>398</u>
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Executive Organizational Chart:



**PROVINCIAL AGRICULTURAL LAND COMMISSION**

ADM Responsible: N/A

Core Business/Program Area Description/Critical Business Processes:

The Agricultural Land Commission is the provincial agency responsible for administering the Agricultural Land Reserve, a provincial land use zone for agriculture. The purposes of the Agricultural Land Commission as set out in legislation are: a) to preserve agricultural land; b) to encourage farming on agricultural land in collaboration with other communities of interest; and c) to encourage local governments, First Nations, the government and its agents to enable and accommodate farm use of agricultural land and uses compatible with agriculture in their plans, bylaws and policies. The *Agricultural Land Commission Act* sets out processes for the inclusion or exclusion of land to and from the Agricultural Land Reserve and for non-farm use and subdivision of land within the Agricultural Land Reserve. As an administrative tribunal acting pursuant to the *Agricultural Land Commission Act* and the *Administrative Tribunals Act*, the Agricultural Land Commission considers each application on its individual merits through a fair and transparent review process.

The Agricultural Land Commission is an administrative tribunal under provincial legislation to implement legislative policy. Appointment to the Agricultural Land Commission is by Order in Council and in the case of the Agricultural Land Commission, some members are appointed by Ministerial Order. Candidates for appointment are chosen for their knowledge and expertise and their experience in the particular sector being regulated by the legislation. As per its governing legislation, Commission members must be knowledgeable in matters relating to agriculture, land use planning, local government or First Nations government. Administrative tribunals perform a wide range of functions, including research and recommendations; rule making and policy development; adjudication; and standard setting.

Administrative tribunals function at arm's length from government and are expected to exercise their role in a non-partisan manner; however, the precise relationship between administrative tribunals and government varies. The Agricultural Land Commission is an organization with a separate Vote of the Provincial Legislature and is not a program or branch/division of a government Ministry.

Budget:

Fiscal 2013/14 - \$2,905,000

Full Time Equivalents (FTEs):

20 funded FTEs. Current org chart is draft - 2013/14 structure is under development.



Appendix C

Related Legislation:

- *Agricultural Land Commission Act*
- BC Regulation 171/2002; Agricultural Land Reserve Use, Subdivision and Procedure Regulation

Current Appointees:

Richard Bullock, Chair; Jennifer Dyson, Vice-Chair; Gordon Gillette, Vice-Chair; Sylvia Pranger, Vice-Chair; Jim Johnson, Member; Jim Collins, Member; Denise Dowswell, Member; Jerry Thibeault, Member; Lucille Dempsey, Member; Bert Miles, Member

Appointment Required

None required at this time

Issues

Discuss potential legislative and regulatory and policy changes (60 days)

Organizational Chart:

See attached



AGRICULTURE POLICY AND LEGISLATION BRANCH

ADM Responsible:

Melanie Stewart

Agriculture Policy and Legislation Branch:

The Agrifoods Policy and Legislation Branch is responsible for four program areas: agriculture policy (including meat inspection program policy and implementation), fisheries and seafood policy (including aquaculture development) legislation, and intergovernmental relations.

The branch establishes direction for major policy, regulatory and legislative initiatives including issues such as trade negotiations, *Water Act* Modernization, regulated marketing, meat inspection, and the Agricultural Land Reserve. The policy unit is accountable for the research, analysis and consultation that informs these initiatives, and for ensuring that Ministry executive, staff and programs are aware of and aligned with these initiatives. The fisheries and seafood policy unit leads provincial efforts to support stable, diverse and sustainable commercial and recreational marine fisheries and aquaculture operations. This includes collaborating with Fisheries and Oceans Canada in the development of national fisheries policies for new and emerging fisheries, and in the development of positions for international fisheries negotiations between Canada and the United States (salmon, tuna, halibut, hake) for collaborative fisheries management regimes. The legislation unit is responsible for managing, reviewing and providing strategic advice on the Ministry's legislative program consistent with Ministry and government policy, strategic objectives and accountability measures. The branch also provides interpretation, strategic advice, and coordination on matters of intergovernmental relations and leads coordination of Ministry service planning activities.

Budget:

\$9.002 million

Full Time Equivalents (FTEs):

24 FTEs YTD Average Burn

Related Legislation:

Management and regulation of agriculture and agrifoods is a shared jurisdictional interest of both the federal and provincial government. The legal and regulatory environment that guides the work of the Ministry includes 31 statutes which relate wholly or primarily to the Ministry and a further 73 regulations relating to the Ministry. A complete list of legislation for which the Ministry is responsible is available at: [AGRICULTURE - Statute Administration](#).



INNOVATION AND INDUSTRY DEVELOPMENT BRANCH

ADM Responsible:

Melanie Stewart

Innovation and Industry Development Branch

Core Business

The Innovation and Industry Development Branch has a lead role in interacting with the BC Agrifoods Sector to enhance the sector's growth, competitiveness, and sustainability. The branch provides ongoing expertise and support alongside strategic targeted initiatives and programs in marketing, production strategies, and innovation, to promote competitiveness and ensure the long-term environmental sustainability of agriculture in British Columbia. The development of targeted marketing, development and innovation programs and initiatives is informed by strong industry expertise, rigorous statistical analysis, and market intelligence and promotion. The branch also includes the ministry's climate action unit.

Program Area Description

The branch delivers activities and programs which facilitate the expansion of domestic and international markets, and grow BC's agrifoods advantage. The branch supports the agrifoods sector to proactively address environmental risks and the impacts of climate change. .

The branch provides expert advice and market intelligence to the sector, and designs and delivers domestic and international programs and initiatives including international trade shows and social media campaigns. These activities help the sector capture new and emerging opportunities in domestic and global markets. The branch also works to accelerate the pace of innovation through the design and delivery of strategic projects and initiatives that facilitate commercialization and adoption of new technologies, and promote new opportunities in agrifoods, bioproducts and green energy practices. The branch also contributes to the goals and targets set out in the Province of British Columbia's Climate Action Plan by developing strategies to help local governments and farmers adapt to the impacts of weather, climate and climate change. The branch works closely with provincial and local industry associations to explore, develop and implement strategic plans, research projects, and funding opportunities. The branch supports the industry Councils, administers industry trusts, and manages the Ranching Task Force and Tree Fruit AgriFlexibility initiatives and the Greenhouse Carbon Tax Relief Grant Program. The aim is to strengthen industries' ability to meet challenges and take advantage of opportunities posed by changing market conditions, regulations, policy requirements, and foreign investment.



Critical Business Processes

Program administration:

- AgriFlexibility Initiatives: Ranching Task Force Funding Initiative and Tree Fruit Marketing and Infrastructure Innovation Initiative
- 2013 Greenhouse Carbon Tax Relief Grant Program
- Buy Local Program
- Innovation, Market Intelligence and Advisory Services and Market Development components of the federal/provincial Growing Forward 2 Agreement.
- AgriInnovation Program: Innovation and Climate Unit administer the Innovation and Climate Action program on behalf of the Province of British Columbia and Agriculture and Agrifoods Canada (approx \$27 million/5 years)
- Growing Forward 2, Strategic Initiatives: Market Development and Innovation

Budget:

\$9.929 million

Full Time Equivalents (FTEs):

30.77 FTEs YTD Average Burn

Related Legislation:

- *Farming and Fishing Industries Development Act*
- Section 20(1) of the BC Fisheries Act requires Unit staff to collect records of licenses
- Schedule 1 of the *Carbon Tax Act*



The Meat Inspection Program Branch

ADM Responsible:

Melanie Stewart

Provincial Meat Inspection Program:

The Provincial Meat Inspection Program Branch is responsible for ensuring a safe, sustainable and cost-effective provincial meat inspection system for provincially-licensed Class A and B abattoirs, and working in collaboration with Regional Health Authorities to license and manage Class D and E licenses for on-farm slaughter.

The branch works within the Ministry and with other strategic partners, including Ministry of Health and Environment, the western provinces and the Federal government to ensure coordination and implementation of policy, regulation and legislation on animal health and welfare, disease control and surveillance and water and waste management related to the operation of slaughterhouses.

By December 31, 2013, meat inspection field staff will take over the provision of provincial meat inspection services from Canadian Food Inspection Agency in provincially-licensed abattoirs to ensure that carcasses entering the food chain are safe for human consumption. A new food safety code of practice and new humane slaughter training will be a new requirement when on-farm slaughter licenses are renewed to improve food safety standards for uninspected meat in BC.

Budget:

2013-14: \$6.7 million;

2014-15: \$5.6 million;

2015-16: \$5.62 million

Full Time Equivalents (FTEs):

2013-14 - 43 FTEs

2014-15 - 48 FTEs

Related Legislation:

- *Food Safety Act*



PLANT AND ANIMAL HEALTH BRANCH

ADM Responsible:

Melanie Stewart

Plant and Animal Health Branch Description:

The Plant and Animal Health Branch oversees the health of livestock, poultry, fish and crops in British Columbia. There are six major areas of activity within the Branch: Animal Health Centre (a full service veterinary diagnostic laboratory), the Containment Level 3 laboratory, Office of the Chief Veterinarian, Livestock Health Management and Regulation, Plant Health, and Plant Diagnostic laboratory. Particular importance is attached to diseases that could be transmissible from animals to humans (such as avian influenza), and to diseases and pests of economic importance for crops, livestock, poultry and fish that could interfere with trade.

The Animal Health Centre is the largest portion of the Branch in terms of staff and budget. The mandate of the Animal Health Centre is to diagnose and monitor for animal disease in the province and to make recommendations for control, as required. Approximately 5,500 diagnostic samples are processed a year, as well as many surveillance and targeted project samples. **The Containment Level 3** laboratory, housed at the Animal Health Centre, will ensure that highly contagious disease-causing agents are safely cultured and characterized, thus preventing the escape of such agents back into the environment.

The Chief Veterinary Officer is also the Branch Director and Manager of the Animal Health Centre. This position is responsible for the British Columbia *Animal Disease Control Act*. This Act provides the legislation for movement control and quarantining when a provincial reportable disease is diagnosed. The Chief Veterinary Officer is responsible for the development, implementation and evaluation of policies, strategies and programs to: diagnose and monitor, prevent, control, and manage diseases in the livestock, poultry and aquaculture industries in British Columbia.

The Plant Health Unit (which includes the **Plant Diagnostic Laboratory**) and as described in detail in the 5-year strategic plan, contributes to the agri-food industry's ability to manage plant pests that threaten crop production, the viability of new crops, competitiveness and the environment. The provincial plant health program works to protect the capacity of BC's agricultural and natural land resources from established and emerging pest threats through legislation, surveillance, pest identification, technical guidance, education/awareness and support of critical programs. Professionals in plant pathology, entomology pesticide management work with Ministry crop specialists, industry and other stakeholders to address plant health issues. Effective management of plant pests contributes to the protection of human health and the environment by promoting best management practices and by minimizing the risks from critical pests on agriculture and biodiversity.



Appendix C

Livestock Health and Regulatory Unit works with industry and government to provide leadership in many areas of agriculture. The Dairy Program is responsible for setting and enforcing standards of food safety for all on-farm production of milk at over 550 dairy farms across the province in support of the *Milk Industry Act* and Milk Industry Standards Regulation. The health management group supports the sustainability of animal agriculture, while serving to protect the wellbeing of the people of the province by providing support for informed policy on zoonotic disease, and other aspects of public health such as the use of antibiotics in livestock, poultry and fish, investigating zoonotic diseases, as well as diseases that have economic impact on livestock production. The Bee Program supports the voluntary registration of all bee hives in the province, educational programs at beginner through to advanced levels of bee production as well as inspection of hives to support legislative responsibilities under the *Bee Act*. The Unit is responsible for licensing and regulatory issues pertaining to livestock; dairy; fur farms; game farms; the manufacture and sale of medicated feed; the sale of veterinary drugs. The Unit deals with regulatory issues such as livestock at large, livestock protection and livestock liens.

Budget:

\$5.509 million

Full Time Equivalents (FTEs):

49.45 FTEs YTD Average Burn

Related Legislation:

- *Animal Disease Control Act*
- *Bee Act*
- *Fur Farm Act*
- *Game Farm Act*
- *Livestock Act*
- *Livestock Identification Act*
- *Livestock Lien*
- *Milk Industry Act*
- *Plant Protection Act*
- *Seed Potato Act*
- *Veterinary Drugs Act*



Appendix C

- *Agriculture Produce Grading Act* (poultry parts only)



PROGRAM PERFORMANCE AND EVALUATION UNIT

ADM Responsible:

Melanie Stewart

Program Performance and Evaluation Unit

- Responsible for the administrative coordination of federal/provincial funding agreements (Growing Forward 1&2, AgriFlexibility, Agricultural Greenhouse Gases Program)
- Includes: financial administration and reporting; performance monitoring and reporting; communications coordination; contracting and procurement support

Budget:

\$0.001 million

Full Time Equivalents (FTEs):

6 FTEs

Related Legislation:

- N/A



CORPORATE SERVICES for the NATURAL RESOURCE SECTOR

Assistant Deputy Minister / Executive Financial Officer Responsibilities:

Shauna Brouwer	EFO for Agriculture and Environment Responsible for Financial Services
Trish Dohan	EFO for Forests, Lands and Natural Resource Operations Responsible for Sector Client Services
Neilane Mayhew	EFO for Aboriginal Relations and Reconciliation and Energy, Mines and Natural Gas Responsible for Information Management, People and Workplace Strategies

Core Business/Program Area Description/Critical Business Processes:

Formed in 2010, Corporate Services for the Natural Resources (CSNR) is the largest corporate services team in the BC Public Service. CSNR is an integrated entity within the Ministry of Forests, Lands and Natural Resource Operations (FLNR) which has accountability to provide services to the five ministries that make up the Natural Resource Sector.

- Ministry of Aboriginal Relations & Reconciliation (MARR)
- Ministry of Agriculture (AGRI)
- Ministry of Energy, Mines and Natural Gas (EMNG)
- Ministry of Environment (ENV)
- Ministry of Forests, Lands and Natural Resource Operations (FLNRO)

CSNR is led by three assistant deputy ministers (ADMs), each ADM has specific business area accountabilities for the natural resource sector in the service areas of **finance, strategic human resources, client services and information management**. In addition, each ADM has Executive Financial Officer (EFO) responsibility for one or more ministries.

The corporate services model was designed to be flexible. By using a sector based approach, to share best practises, standardize business processes and consolidate resources, significant efficiencies have been achieved. Benefits have included:

- Enhancing integration and coordination across the sector;
- Streamlining processes and providing consistent services across the sector;
- Establishing a single accountability for corporate services functions;
- Optimizing use of NRS facilities and assets where possible;
- Synergies in central agency requirements (e.g. sector Workforce Plans, sector Technology and Transformation Plan,);
- Providing strategic high level financial overviews to improve and support sector based decisions.



Appendix C

Budget:

CSNR supports the Natural Resource Sector and each ministry contributes towards the cost:

	Budget	% Budget
MARR	1,672,000	4%
AGRI	2,898,000	7%
EMNG	1,484,000	3%
ENV	9,754,000	23%
FLNRO	27,385,000	63%
2013/14 CSNR Total	43,193,000	100%

Full Time Equivalents (FTEs): 519*

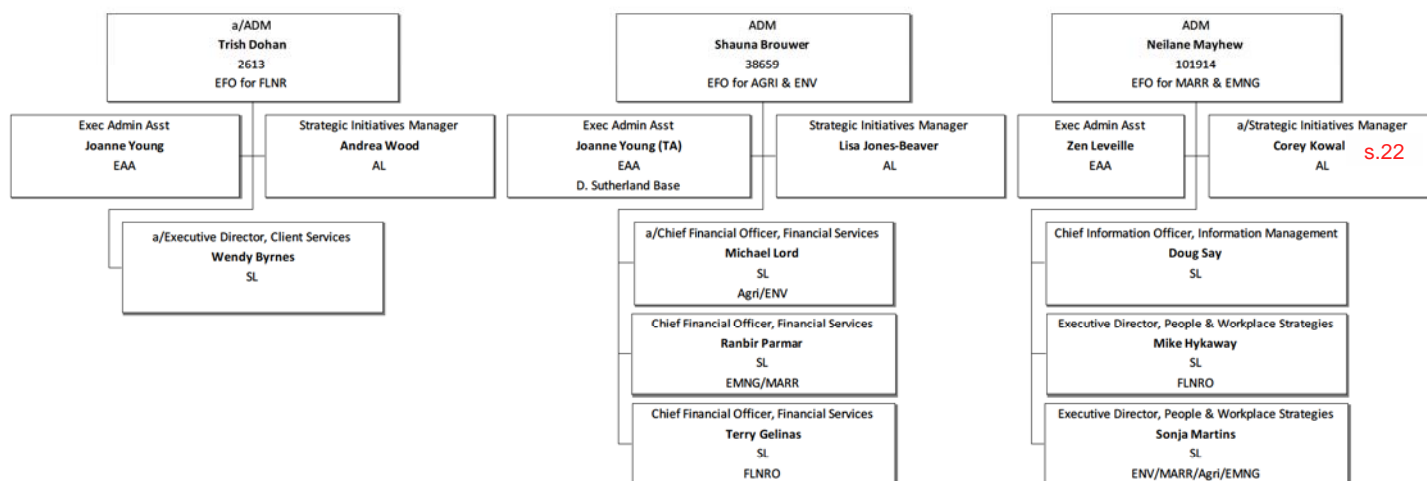
*Includes regular and auxiliary positions – the FTE numbers provided are the YTD burn rate as of December 31, 2012

Related Legislation:

- Financial Administration Act;
- Budget Transparency and Accountability Act;
- Balanced Budget and Ministerial Accountability Act;
- Financial Information Act;
- Supply Acts;
- Public Service Act

Organizational Chart:

Corporate Services for the Natural Resource Sector Executive and ADM Office - April 2013



**BRITISH COLUMBIA FARM INDUSTRY REVIEW BOARD**

ADM Responsible: N/A

Core Business/Program Area Description/Critical Business Processes:

General (regulatory) supervision of eight commodity boards (BC Broiler Hatching Egg Commission; BC Chicken Marketing Board; BC Cranberry Marketing Commission; BC Egg Marketing Board; BC Hog Marketing Commission; BC Milk Marketing Board; BC Turkey Marketing Board; BC Vegetable Marketing Commission) that oversee production (and related processing) sectors representing approximately half of BC's annual farm gate receipts; signatory to formal federal-provincial-territorial agreements in supply management; hearing appeals of commodity board decisions; hearing appeals of Minister of Agriculture decisions to refuse, suspend, revoke or not renew grading licenses; hearing farm practices complaints from persons disturbed by odour, noise, dust or other disturbances arising from agriculture of certain aquaculture operations; conducting farm practices studies; hearing appeals from certain animal seizure and costs decisions of the BC Society for the Prevention of Cruelty to Animals.

Budget:

\$896,000

Full Time Equivalents (FTEs):

9, 8 filled.

Related Legislation:

- *Natural Products Marketing (BC) Act;*
- *Agricultural Produce Grading Act;*
- *Farm Practices Protection (Right to Farm) Act;*
- *Prevention of Cruelty to Animals Act;*
- *Administrative Tribunals Act.*

Current Appointees:

Ron Kilmury, Chair (term expires November 30, 2013); Ron Bertrand, Vice Chair (July 2014); Suzanne Wiltshire (March 31, 2013); Andy Dolberg (July 2014); Diane Fillmore (July 2014); Carrie Manarin (November 2015); Corey Van't Haaff (November 2015).

BC Broiler Hatching Egg Commission: Casey Langbroek, Chair (August 2014); BC Chicken Marketing Board: Daphne Stancil, Chair; Greg Gauthier, Member; John McComish, Member (all September 30, 2013); BC Egg Marketing Board: Richard King, Chair (October 2014); BC Hog Marketing Commission: Gary Rolston, Chair (July 2014); BC Milk Marketing Board: Jim Byrne, Chair (July 2015); BC Turkey Marketing Board: Ralph Payne, Chair (January 2015); BC Vegetable Marketing Commission: David Taylor, Chair (December 2014).



Appendix C

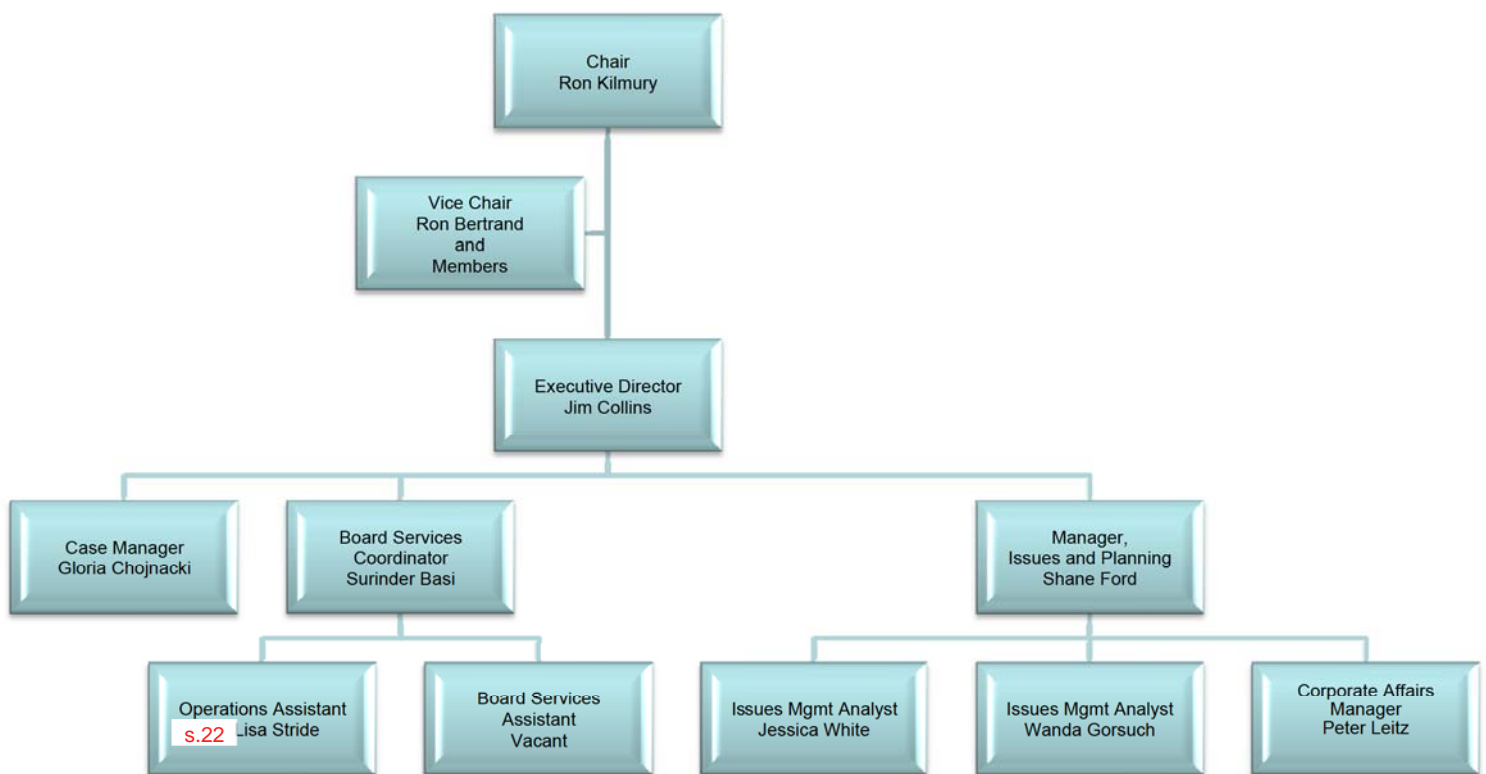
Appointments Required:

- **90 Days: BC Chicken Marketing Board Chair and two Members**

Organizational Chart:

BC Farm Industry Review Board

March 2013



FOOD PROTECTION BRANCH

ADM Responsible:

Grant Parnell

Food Protection Branch Description:

The Food Protection Branch works in partnership with other federal and provincial agencies to facilitate agri-food and seafood safety and to manage marine resources in the public interest.

Through targeted programs, regulation, and extension, the Branch encourages the development and adoption of food safe practices at the production level through to the retail level. In this way, the Branch plays a key role in safeguarding public health and supporting domestic and international confidence in British Columbia agri-food and seafood products.

The Food Protection Branch is currently leading a project to identify British Columbia farm and food premises, a key component in the development of a national agriculture and food traceability system. The national traceability system will provide timely, accurate and relevant information to facilitate emergency management, market access, industry competitiveness and consumer confidence.

The Branch works closely with the British Columbia Ministry of Health Services, the BC Centre for Disease Control, and the Canadian Food Inspection Agency on issues and policy pertaining to the provincial regulation of food safety. The Branch administers the *Fisheries Act* (BC) and the *Fish Inspection Act* (BC). This includes the issuing of licences and permits for commercial harvest of marine plants and for commercial seafood activities including fish buying stations, fish and marine plant processing and cold storage facilities, fish vendors and brokers.

Budget:

The branch is responsible for a budget of \$.120 million.

Full Time Equivalents (FTEs):

13.32 FTEs YTD Average Burn

Related Legislation:

- *Agri-Food Choice and Quality Act*
- *Fish Inspection Act* (BC)
- *Fisheries Act* (BC) (except Part 3 as it relates to the licensing of aquaculture)



SUSTAINABLE AGRICULTURE MANAGEMENT BRANCH

ADM Responsible:

Grant Parnell

Sustainable Agriculture Management Branch Description:

The Sustainable Agriculture Management Branch is active in all major agriculture communities of British Columbia to foster agri-food economic development opportunities and promote systems and practices for on-farm delivery of environmental sustainability and resource development programs. The Ministry's Regional Support Program provides regional sector support in emergency preparedness and coordination, agri-food business knowledge and strategic adaption, First Nations agriculture, youth development, agro-forestry development, and the Regional Agrologist Network.

The Branch identifies and promotes agriculture and food production systems that are environmentally-sustainable by incorporating beneficial management practices to protect soil, water, air and biodiversity quality through a variety of programs and initiatives. The Branch monitors environmental indicators to anticipate and respond to future threats to the environment from current agriculture practices and threats to agriculture from environmental and climate changes.

Through the leadership of the Strengthening Farming Program, and in support of the *Farm Practices Protection Act*, the branch also promotes strong working relationships between the province, agricultural industry and local governments. The Program works toward a positive planning and regulatory climate within local government jurisdictions to encourage investment in agriculture, food and fisheries and to foster consistent approaches to solving urban/agricultural land use conflicts.

The Branch is involved in the delivery or support of a number of provincial agriculture programs including: 4-H, Environmental Farm Planning, Beneficial Management Practices, Agriculture Business Development, Agriculture Area Plans, and wildlife damage compensation.

Budget:

The branch is responsible for a budget of \$5.166 million

Full Time Equivalents (FTEs):

43.44 FTEs YTD Average Burn



Related Legislation:

- *Farm Practices Protection Act,*
- *Local Government Act (Sections 903, 915-919),*
- *Ministry of Forests and Range Act (Section 4).*



AGRICULTURE SCIENCE AND POLICY DIVISION

ADM Responsible:

Melanie Stewart

Agriculture Science and Policy Division provides for:

- surveillance, diagnostic services, and management systems including licensing and inspection to monitor and improve plant and animal health and for the creation and delivery of industry initiatives including research and innovation;
- planning, establishing, and co-ordinating federal-provincial trade agreements and legislation related to a competitive and profitable agriculture sector and for policy and regulatory development, market development and promotion, and economic and statistical analysis for the agrifood and seafood sectors including corporate and leadership support related to business transformation; and
- developing and implementing a new provincial meat inspection system for provincially-licensed abattoirs, licensing and managing on-farm slaughter licenses and working with the industry and retail to enhance the availability of safe BC meat products.

The Agriculture Science and Policy Division is comprised of four branches and one unit:

- Agrifoods Policy and Legislation Branch
- BC Meat Inspection Program
- Innovation and Industry Development Branch
- Plant and Animal Health Branch
- Program Performance and Evaluation Unit

Budget:

\$24.441 million

Full Time Equivalents (FTEs):

127.07 FTEs YTD Average Burn

Related Legislation:

Agricultural Land Commission Act

Agricultural Produce Grading Act

Agri-Food Choice and Quality Act

Agrologists Act

Animal Disease Control Act

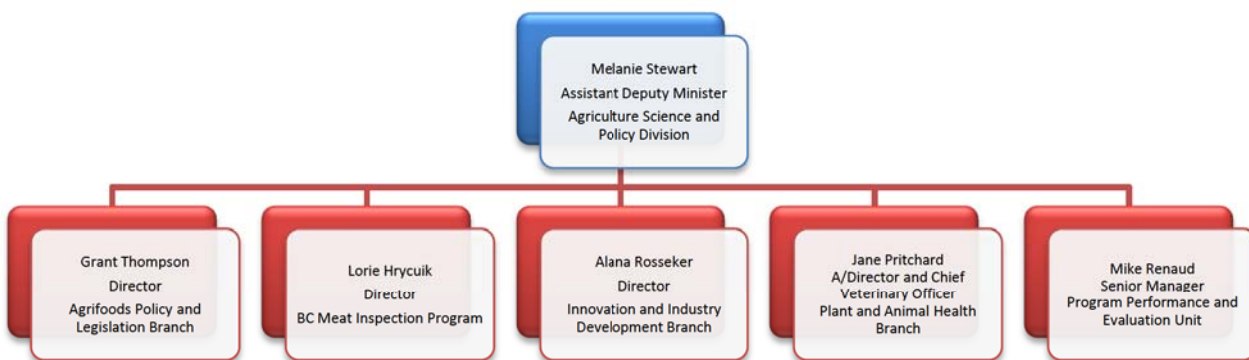
Bee Act

Farming and Fishing Industries Development Act



Fisheries Act (
Food Products Standards Act
Food Safety Act (as it relates to food establishments where animals are slaughtered for food)
Fur Farm Act
Game Farm Act
Livestock Act
Livestock Identification Act
Livestock Lien Act
Milk Industry Act
Ministry of Agriculture and Food Act
Ministry of Forests and Range Act (part)
Natural Products Marketing Act (BC FIRB)
Plant Protection Act
Prevention of Cruelty to Animals Act
Seed Potato Act
Veterinarians Act
Veterinary Drugs Act

Organizational Chart:





STRATEGIC INDUSTRY PARTNERSHIPS DIVISION

ADM Responsible:

Grant Parnell

Core Business/Program Area Description/Critical Business Processes:

This Strategic Industry Partnerships Division:

- provides for provincial and federal-provincial agricultural risk management programs, insurance schemes, and funding of programs and trusts; regional sector support in emergency management; business development; youth development; agroforestry; and, promoting public awareness and support for agriculture and food sectors;
- funds initiatives related to strengthening farming programs including partnerships with industry, local governments, and others to manage land use planning, resolve management issues, and identify opportunities;
- provides for agri-environmental initiatives supporting program development, addressing environmental risks to and from the sector, and development of beneficial management practices; licensing and inspection of fish processing and the administration of the Province's wild marine plant harvests; and, activities relating to food safety, quality, and traceability.

The Strategic Industry Partnerships Division is comprised of three branches:

- Business Risk Management Branch
- Food Protection Branch
- Sustainable Agriculture Management Branch

Budget:

\$34.614 million

Full Time Equivalents (FTEs):

145.18 FTEs YTD Average Burn

Related Legislation:

Farm Income Insurance Act

Farm Practices Protection Act (BC FIRB)

Farmers and Women's Institutes Act

Fish Inspection Act

Fisheries Act (shared with Agriculture Science and Policy Division)

Insurance for Crops Act

Local Government Act (part, s. 916-919)

Special Accounts Appropriation and Control (part, s. 9.2)



Organizational Chart:

