

Diverse and Resilient Ontario's Organic Food System



When it comes down to it – all decisions we make are a guess about the future. The harder our world is to predict, the harder it is to make good guesses. This new series of reports published by the Organic Council of Ontario (OCO) is designed to help us make better guesses about the future of Ontario's organic system.

United by an Ethics of Care

In 2011 - 2012 the Organic Council of Ontario (OCO) conducted over 100 in-depth interviews and 5 focus groups with diverse organic stakeholders across the province. The results illustrate the wide range of different approaches to farming, food distribution, retailing in the organic food system. Despite this diversity, almost everyone we spoke to talked about the care for others and for the earth that brought them to and keeps them in 'organics'. This 'ethics of care' unites us and gives us the common foundation on which to build.



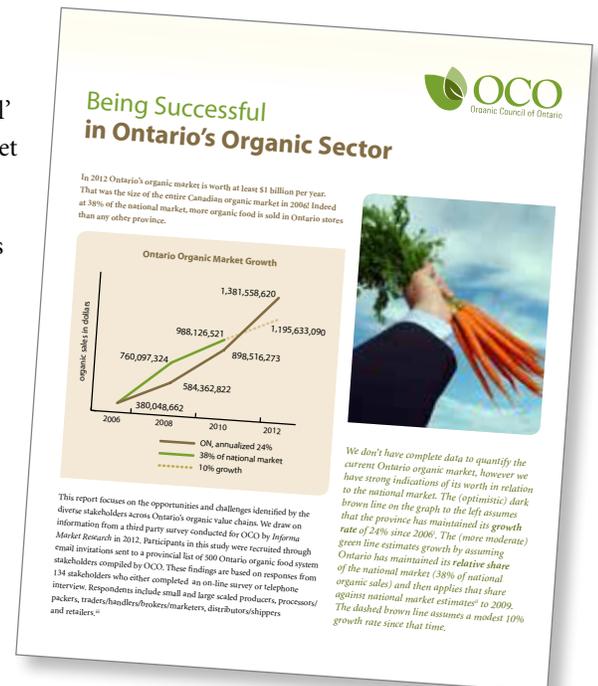
Information from these interviews was supplemented with a series of surveys on Ontario's mainstream and alternative organic markets. In this series of reports, we draw on information from a third party survey distributed to 500 organic stakeholders, an audit of farmers markets and on-farm markets, a survey of CSA (Community Supported Agriculture) farmers and an analysis of production data from certification bodies.

Being Successful in Ontario's Organic Sector

This report describes how Ontario's organic food system continues to be poised for growth as all stakeholder groups express interest in expanding and diversifying products and marketing channels.

Report Highlights:

- The largest challenge ahead is consumer confusion about organic and 'natural' claims. Ontario's organic food system needs to face and respond to new market entrants who are making green and ethical claims.
- Size matters. Differently scaled operators along Ontario's organic value chains have different hurdles to overcome if the growth is to materialize.
- There is enthusiasm in the organic sector for re-connecting where (local) and how (organic) food is produced. Stakeholders are interested in sourcing local and diversifying into more local distribution channels.
- The historic separation between 'artisanal' or 'direct to consumer' channels and 'mainstream' or 'wholesale' markets seems to be blurring. Our largest producers see opportunity in local channels while our smallest are pursuing sales to supermarkets and natural food stores, suggesting a vibrant sector that continues to evolve.



The Feeders Meet the Eaters - Direct Marketing in Ontario's Organic Sector



This report estimates the direct-to-consumer organic market in Ontario to be upwards of \$192.3M. That's 17% of the Ontario organic retail market! But, without provincial regulation of organic claims, it is difficult to know what to "count" as organic in these markets.

Report Highlights:

- Direct to consumer organic markets are dominated by smaller scaled diverse farms. These farmers emphasized to us that certification under the Canadian Organic Regulation is expensive and tedious for small scaled operations where production is so varied.
- Despite this challenge, certified organic producers are over-represented in direct to consumer markets, demonstrating the value they place on local connections with eaters and building trust around food. While certified organic producers make up fewer than 2% of all Ontario farms, they make up 27% of CSAs, 10% of farmers market vendors and 4% of on-farm markets in the province.

Organic Production in Ontario

Using data from certification bodies, this report takes a closer look at Ontario's certified organic producers, the crops they produce and the land they manage.

Report Highlights:

- While total acres under organic production keep increasing, the number of certified organic farms in Ontario has decreased from 716 to 685 in 2011.
- Field crops & forages, dairy cattle and wine grapes are the enterprises that have experienced the most growth. Not surprisingly, they are the crops for which we have well developed value chains after the farm gate.



Organic Certification in Ontario

Producers are highly committed stakeholders in Ontario's organic system – half of them have been certified organic for over 10 years! This report describes the state of organic certification in the province.

Report Highlights:

- Already half of businesses with under \$100,000 per year in sales (who are selling intra provincially) are working to ensure organic integrity by certifying voluntarily. These firms and farms represent future growth in the sector. We need to level their playing field and make certification more affordable.
- The small number of transitioning businesses is a concern, but we have strong commitment to certification among established firms and farms in the sector to leverage. There is an opportunity for peer support and mentorship programs for new entrants around certification.
- A significant number of firms after the farm gate are benefiting in the organic sector but are not certified and are handling relatively small amounts of organic product. We have a growth opportunity in deepening their organic commitment and increasing the proportion of organic products in their mix.



Location, Location, Location

Ontario is a complex place. Consumers and organic markets in large urban centres are quite different than those in smaller towns and rural areas where the lower population and geographic dispersal presents challenges. This report describes regional differences in Ontario's organic sector. It concludes that most organic firms and farms are located in Western (37%) and Eastern (36%) regions of the province, with the remainder in Central (18%), Metro (7%) and Northern (3%) regions.

Growing Ontario's Diverse Organic Sector: Information Sources and Needs

This report summarises the ways that different organic stakeholders get information now, what new kinds of information will help them grow the sector and what kinds of information they are willing to share with others.

Over the next months, the Organic Council of Ontario will be discussing these findings within the sector to try to reach consensus on the next steps we can take toward meeting these information needs. We will be pragmatic. We will look for the 'low hanging (organic!) fruit'. We will play to our strengths and work with the stakeholders who are most keen.

We welcome your interest and participation in the discussion.



About OCO

The Organic Council of Ontario (OCO) is a non profit association representing all members throughout the value chain including producers, processors, marketers, distributors, suppliers, certifiers, retailers, restaurants **and now co-farmers** to provide leadership and support the continued growth of Ontario's organic sector.

Join today and Count Yourself In!

www.organiccouncil.ca

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