November 2018

Organic Agriculture in the Prairies

2017 DATA

Report by the Canada Organic Trade Association

Supported by:

prairie organic grain initiative

organic ALBERTA

Sask Organics
Organically Grown in Saskatchewan

MOA
Manitoba Organic Alliance

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November 2018

This report was created by the Canada Organic Trade Association and commissioned by the Prairie Organic Grain Initiative. All figures reported are best estimates using data provided by organic certification bodies.

CANADA ORGANIC TRADE ASSOCIATION

The Canada Organic Trade Association (COTA) is the membership-based trade association for the organic sector in Canada, representing growers, shippers, processors, certifiers, farmer associations, distributors, consultants, retailers and all points along the organic value chain. COTA promotes and protects the growth of organics to benefit the environment, farmers, the public and the economy.
www.canada-organic.ca

PRAIRIE ORGANIC GRAIN INITIATIVE

The Prairie Organic Grains Initiative is a four-year program dedicated to achieving resiliency and stability in the Prairie organic sector by focusing on increasing the quantity and quality of organic grains and developing relationships across organic market value chains. The Prairie Organic Grain Initiative has strategic partnerships with the three Prairie provincial organic associations: Organic Alberta, SaskOrganics and Manitoba Organic Alliance.

TABLE OF CONTENTS

EXECUTIVE SUMMARY

Now in its fourth year of publication, the Prairie Organic Agriculture Report provides up-to-date acreage and operator information for Canada's Prairie provinces. As consumer demand continues to grow, farms, processors and retailers are choosing to participate in the organic sector. This has resulted in an increase in certified organic operations, along with an expansion of certified organic acreage across the Prairie landscape. Organic operations and acreage constitute approximately two percent of farmland and two percent of farms, as measured by the Census of Agriculture. Organic farm numbers and acres are growing despite the overall decline in non-organic farms and lack of overall acreage growth. Collectively, the Prairie organic food and beverage market is valued at $862 million, constituting over a fifth of the Canadian market. Alberta's organic food and beverage market is valued at $676 million and together, the Saskatchewan and Manitoba markets are valued at $186 million.[1]

KEY FINDINGS

- Home to 29% of certified organic operations, over a third of organic crop producers and 58% of certified organic acreage, the Prairies are a key contributor to the organic sector in Canada.
- Organic acreage expanded from 1.6 to 1.8 million acres between 2016 and 2017. All three Prairie provinces recorded over 28% growth in organic acreage between 2015 and 2017.
- Certified organic operations numbered 1,840 in 2017, up from 1,625 in 2016.
- Sixty-four percent of Prairie acreage is in SK, 30% in AB and 6% in MB; Fifty-five percent of Prairie producers are in SK, 33% in AB and 12% in MB.
- There has been little growth in organic livestock operations in the past four years; estimates remain between 120 and 130. This is likely due to the lack of a developed value chain for organic beef cattle.
- Since 2016, the number of organic processors increased by 50, reaching 165 in 2017.
- The Prairie organic food and beverage markets are now collectively valued at over $850 million. Seventy-four percent of Albertan grocery shoppers choose organics weekly, while 62% of grocery shoppers in SK and MB do the same.[1]
- The quality of data is improving but there is still much work to be done to establish more robust collection and analysis methods for organic sector data.

METHODOLOGY

Organic certification bodies across Canada and the United States voluntarily supply the operation and acreage data to COTA for analysis and release. This data is analyzed by the Canada Organic Trade Association and examined by experts in the Prairie organic sectors. While the data submitted becomes more robust each year, it can still vary in detail, categorization and delivery format. For this reason, the numbers presented in this report represent a best estimate using the data provided. Ongoing efforts are in place to streamline and facilitate the data collection process and improve the quality and breadth of the data collected.

Important notes:

- ROUNDING: All numbers presented are best estimates using data provided. In this year's report, all data is rounded to emphasize that there are issues with data quality and completeness. Due to rounding, some totals may not be equal to the sum of the rounded sub-categories.
- HISTORICAL DATA: Data is revised as necessary to account for any historical data errors or gaps that have been resolved. For this reason, the figures presented here may not align with past reports released by the Prairie Organic Grain Initiative or the Canada Organic Trade Associatio.
- MEASUREMENT: Acreage refers to land measured in acres.

[1] Figures from the 2018 Organic Market Reports for Alberta, Saskatchewan and Manitoba. Contact Organic Alberta, SaskOrganics and Manitoba Organic Alliance to access these reports.

- **CERTIFIED ONLY:** This analysis only includes operations and acreage that are certified organic, as per the Canadian Organic Standards. Acreage and operators in transition are not included, as tracking is nearly impossible; regulations require operators to be under the supervision of a certification body only in the last 15 months of transition.
- **OPERATION TYPES:** There are three operation types. An operation may fall in multiple categories:
    - '**Processors**' includes a spectrum of organic operations, including processors, handlers, millers, seed cleaners, abattoirs, broker/buyers, baggers and packagers.
    - '**Crop producers'** are defined as those who produce or collect crops (field crops, vegetables, fruits, nuts, etc.).
    - '**Livestock operations'** are those with organic livestock on the premises.
- **COLLECTION:** Data for 2009-2012 was collected by the Canadian Organic Growers. Data for 2013-2017 was collected and analyzed by the Canada Organic Trade Association.

COTA would like to sincerely thank all organic Certification Bodies and associations that provided the data used in this analysis. Their voluntary participation plays a valuable role in understanding and supporting the organic sector in the Prairies and across Canada.

A well-deserved thank-you to:

CCOF Certification Services Inc. (CCOF)
Consorzio per il Controllo dei Prodotti Biologici Società a responsabilità limitata (CCPB)
Centre for Systems Integration (CSI)
Certified Organic Association of BC (COABC)
Ecocert
Global Organic Alliance (GOA)
Fraser Valley Organic Producers Association (FVOPA)
International Certification Services Inc. (ICS)
Oregon Tilth
Organic Crop Improvement Association (OCIA)
Organic Producers Association of Manitoba (OPAM)
Pacific Agricultural Certification Service (PACS)
ProCert Organic
Quality Assurance International (QAI)
TransCanada Organic (TCO) Cert

THE PRAIRIES IN CONTEXT

The Canadian organic sector continues to record significant growth despite the overall agricultural land base remaining stable and non-organic farm operations in decline.[2] There are now over 6,000 certified organic operations, over 4,200 certified organic producers and 3.2 million certified organic acres. Between 2011 and 2017, organic farmland increased by over 45%, while total farmland remained fairly stable with a decrease of one percent. Similar to the national trends, the Prairies are reporting growth in organic operators and organic acreage.

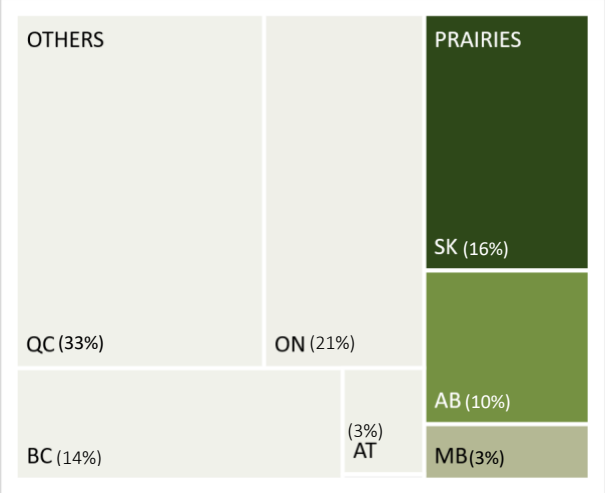
According to the 2017 data, the Prairies represent:

- 29% of organic operations;
- 33% of organic crop producers (including fruit, vegetable and grain producers);
- 14% of organic processors;
- 17% of organic livestock operations and;
- 58% of organic acres.

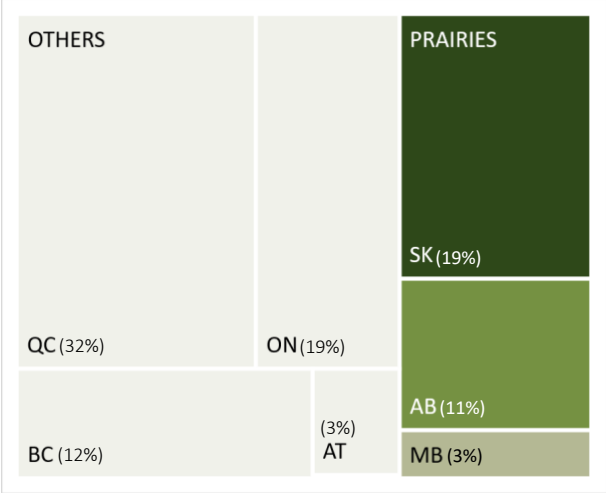
The distribution of organic operators, producers and acreage across the provinces is shown below. Quebec has the most operations and producers. Saskatchewan ranks third for operations and second for producers. Alberta ranks fifth for both operators and producers, while MB is ranked lowest nationally when Atlantic provinces are taken as a group. In terms of acreage, SK is in the top spot followed by British Columbia, then AB. Manitoba sits ahead of the Atlantic provinces.

FIGURE 1 | DISTRIBUTION OF ORGANIC OPERATIONS, CROP PRODUCERS AND ACREAGE NATIONALLY, 2017

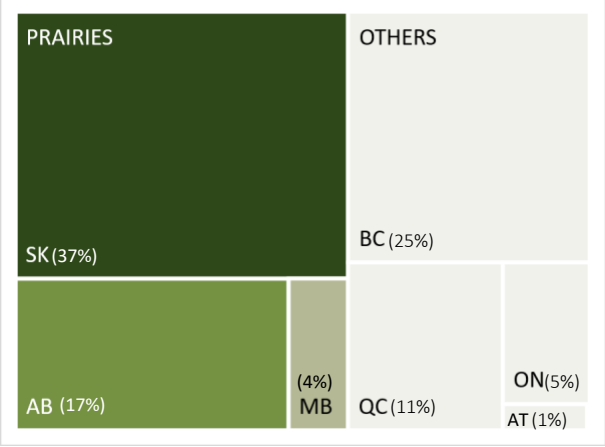
TOTAL OPERATIONS



CROP PRODUCERS



ACREAGE



The Prairies are represented by the coloured boxes while all other provinces are shown in grey. Most operations are in QC and Ontario, due in part to greater numbers of processors and producers. The Prairies represent a third of crop producers, which includes those who produce grain, fruits, vegetables, wild collection and more. It is clear that the Prairies represent a higher portion of Canada's organic farmland than operators or producers.

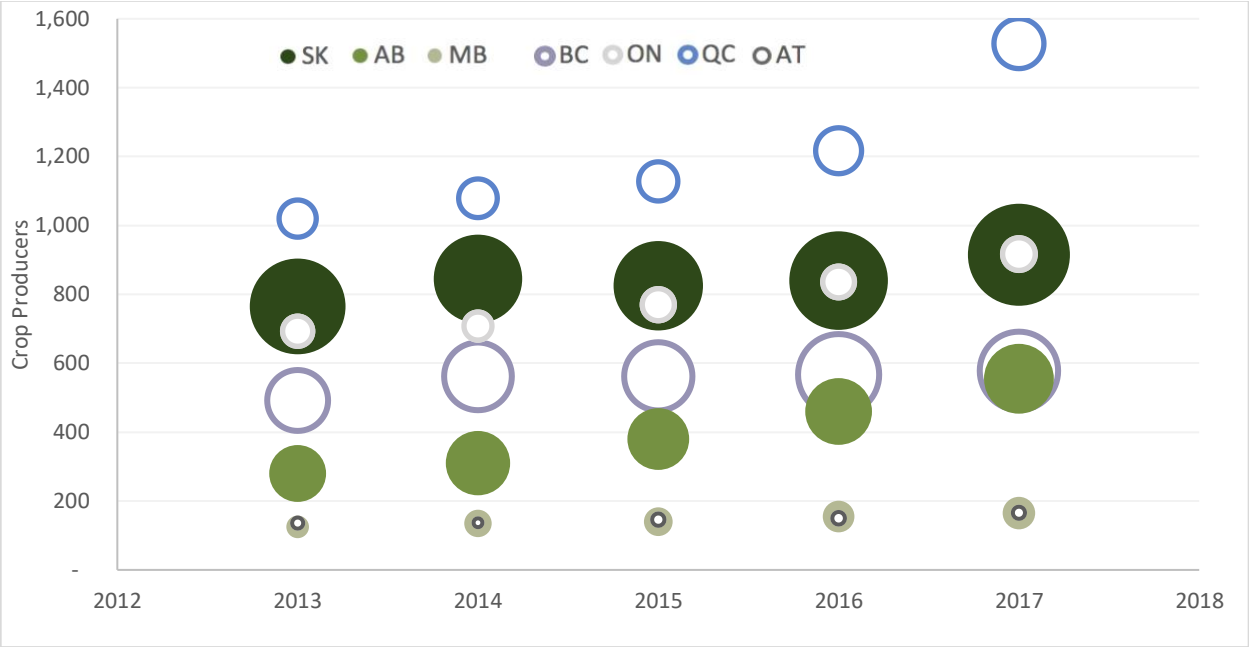
Notes:
- AT = Atlantic Provinces
- Northwest Territories and Yukon values are not shown as they are too small.

[2] According to the Census of Agriculture, between 2011 and 2016, total farm operations declined by six percent and total agricultural lands decreased by one percent.

Figure 2 shows that there isn't a clear link between producer numbers and acreage since different types of agriculture require different land allotments to be viable. For example, QC has the most producers but fairly small acreage. In contrast, SK has the second highest number of producers and demonstrably more farmland. This is likely because QC has more fruit and vegetable producers who tend to operate on areas of land that are smaller than those of the grain producers in the Prairies and in SK in particular.

Alberta's producer numbers have been growing, along with a moderate increase in acreage. Manitoba is more stable and on par with the Atlantic provinces in regards to producer numbers, though MB has more acres.

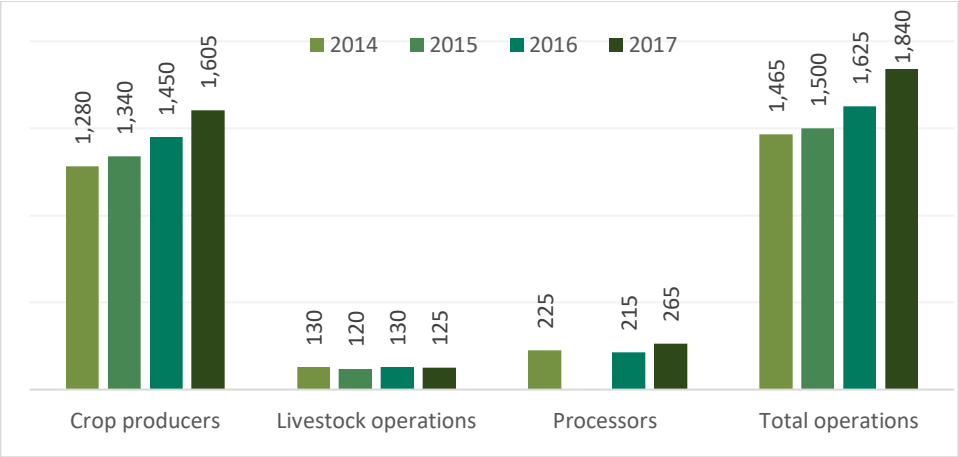
FIGURE 2 | GROWTH OF CROP PRODUCERS AND ACREAGE BY PROVINCE, 2013 – 2017



The x-axis is the timeframe and the y-axis shows producer numbers. Bubbles vary in size according to total organic acreage and are colour coded by province. For reference, SK's 2017 acreage (dark green) is 1,162,000 for 2017. On the other end of the spectrum, the Atlantic provinces (dark grey outline) only had 118,000 acres in 2017.

OPERATIONS

FIGURE 3 | PRAIRIE ORGANIC OPERATIONS BY OPERATION TYPE, 2014 - 2017

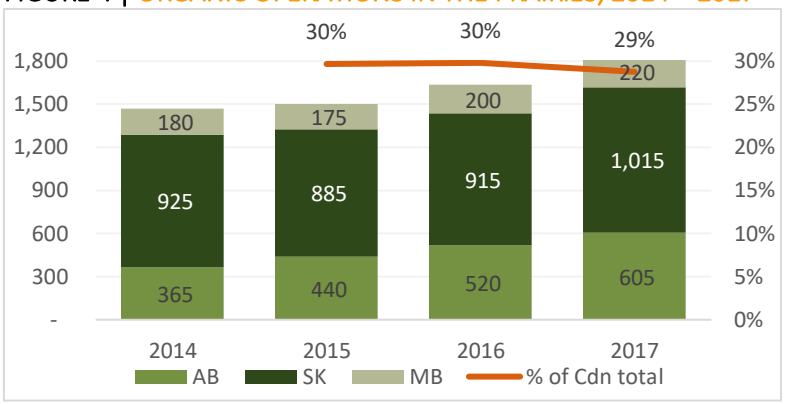


The number of organic operations in the Prairies has steadily increased since 2014. There are now 1,840 organic operations in the Prairie provinces. The most gains have been in the number of producers. Following a dip, there has been a moderate increase in the number of processors. Livestock operation numbers have remained fairly stable since tracking of these numbers began.

* See analysis notes for processor definitions. Processor estimate for 2015 removed due to likely data error.
** Total operations is not a sum of the other categories as some operations fit into multiple categories.

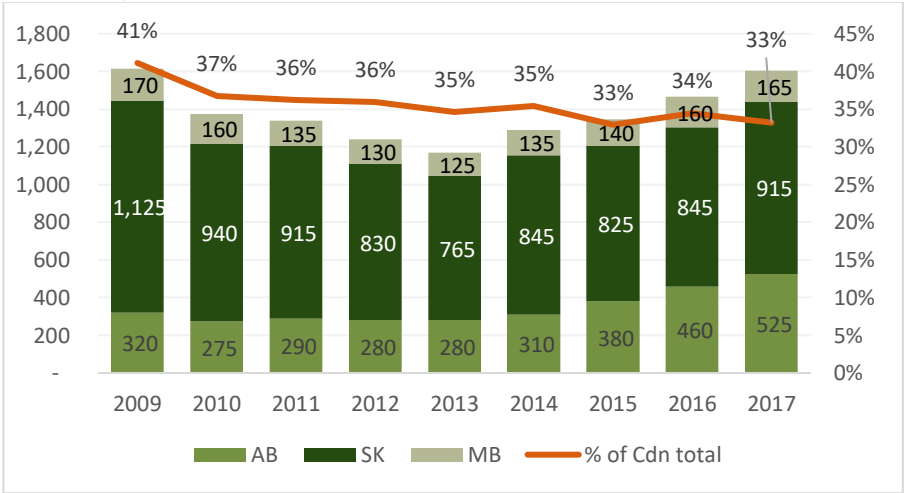
Since 2014, there has been a steady increase in organic operations across the Prairie region. Manitoba's total operations have increased by 40. Saskatchewan's total operations have increased by 90, despite a dip in 2015. Alberta has seen the largest growth, with 240 more operators than in 2014. Since tracking of this figure began in 2015, the percentage of Canada's organic operations that are based in the Prairies has remained fairly steady at about 30%.

FIGURE 4 | ORGANIC OPERATIONS IN THE PRAIRIES, 2014 – 2017



* There is no Canadian total for organic operations for 2014, so a Prairie percentage is unable to be calculated.

FIGURE 5 | ORGANIC CROP PRODUCERS IN THE PRAIRIES, 2009 – 2017

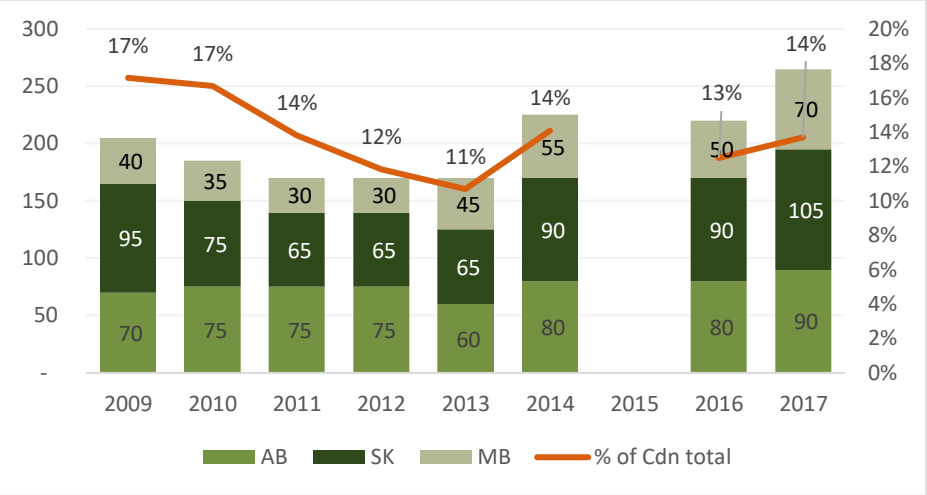


The category of organic crop producers includes primary producers who grow field crops, fruits and vegetables, or participate in wild collection. Of all the datasets, this category has been tracked the longest, with data available from 2009 onwards. In the Prairies and nationally, there was a dip in producer numbers following the 2008 recession. Since 2013, the number of Prairie crop producers has been steadily increasing across all three provinces.

Manitoba and SK haven't surpassed their previous peak of producer numbers in 2009. Alberta surpassed the 2009 number in 2015 and has continued to increase in the two years following. The percentage of Canadian organic producers in the Prairies has fallen since 2009, but remained steady in the last few years.

Organic processors include a spectrum of organic operations, including processors, handlers, millers, seed cleaners, abattoirs, broker/buyers, baggers and packagers.[3] There are now an estimated 265 organic processors in the Prairies. This number has remained fairly stable since 2014. Similar to crop producers, the portion of national organic processors located in the Prairies has declined since 2009, settling at around 14% since 2014. The 2015 data has been excluded due to issues in the analysis.

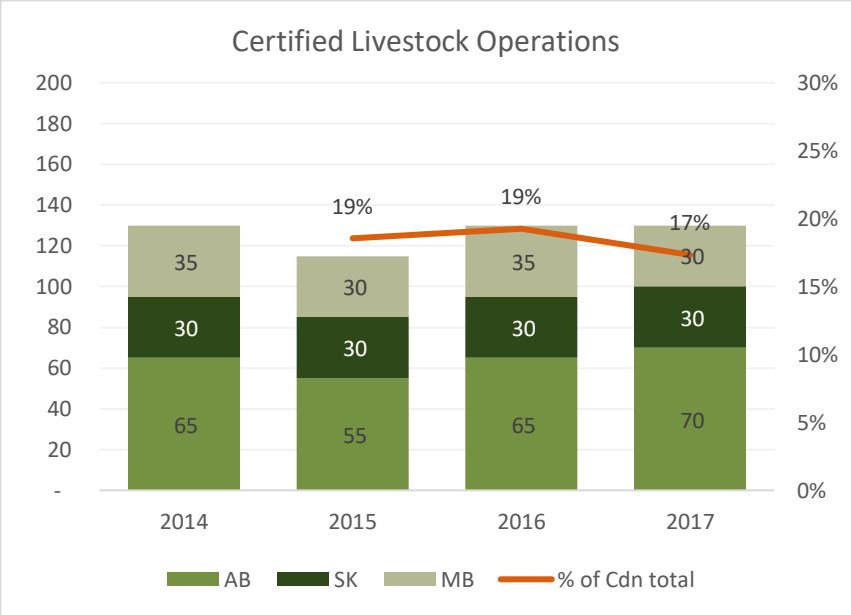
FIGURE 6 | ORGANIC PROCESSORS IN THE PRAIRIES, 2009 – 2017



* 2015 numbers excluded due to likely data error.

As the number of producers grows, there should likewise be growth in the number of processors. In some cases, the lack of processors is a constraint for producers who would otherwise choose to certify. For example, the number of livestock operations in the Prairies has not grown over time. It is likely that they are constrained by the shortage of federally-inspected certified abattoirs, as well as companies that finish organic animals and market organic meat products. A forthcoming report to be released by the Canada Organic Trade Association will provide an in-depth analysis of organic processing in Canada.

FIGURE 7 | ORGANIC LIVESTOCK OPERATIONS IN THE PRAIRIES, 2014 – 2017



* Canadian total of livestock operations in 2014 not available.

The number of organic livestock operations in the Prairies has remained stable since tracking of this data began. Similar to other categories, AB shows the steadiest growth, while SK's numbers are stable and MB's numbers fluctuate.

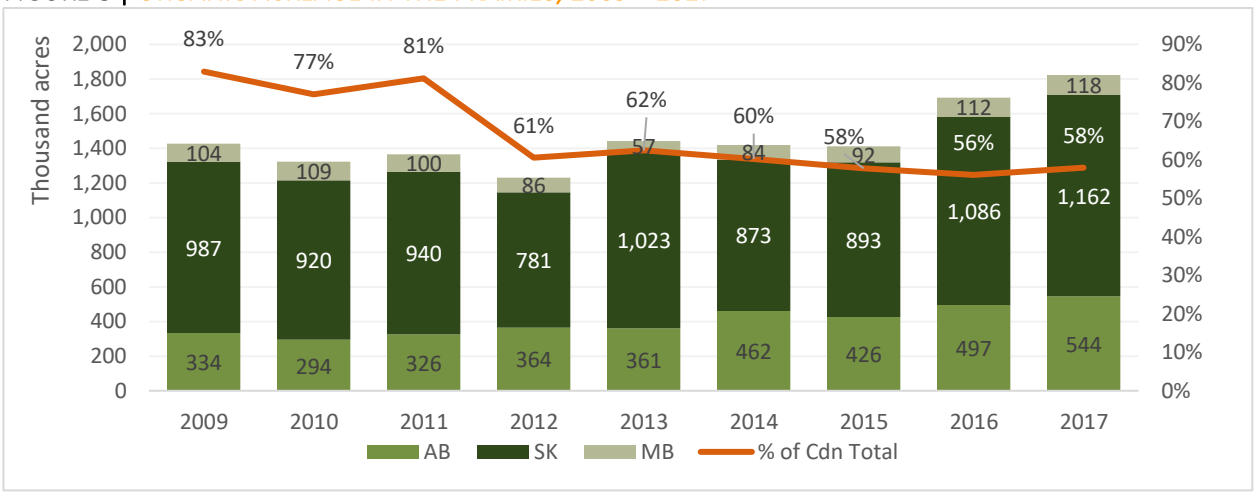
The organic livestock sector has been growing in other regions, primarily in ON and QC. As a result, the Prairie organic livestock sector dropped from 19% to 17% of total Canadian livestock operations.

[3] COTA will be releasing an in-depth report on organic food processing in Canada. Because this report uses a different definition of processors, the numbers will not align.

ACREAGE OVERVIEW

Acreage in the Prairies has been increasing for the last three years, reaching 1.8 million acres in 2017. There was an addition of over 250,000 acres across the three provinces. Similar to operation numbers, there was a decline in organic acres between 2009 and 2013. The 2013 number jumped fairly significantly due to gains in SK acreage. Between 2013 and 2015, acreage remained more or less stable, while demonstrable growth was recorded in 2016 and 2017.

FIGURE 8 | ORGANIC ACREAGE IN THE PRAIRIES, 2009 – 2017



The portion of Canadian organic acres based in the Prairies has been between 56% and 58% for the past three years, settling at 58% for 2017. Prior to this, the Prairies represented a larger portion of national acres, peaking at 83% in 2009.

Saskatchewan represents 64% of organic Prairie acreage, followed by AB with 30% and MB with six percent. In terms of how organic acreage is used, all three provinces have a similar composition. Pasture, forage and natural areas comprise the most acres, followed by field crops.

TABLE 1 | ORGANIC ACREAGE IN THE PRAIRIES BY CATEGORY AND PROVINCE, 2017

	AB	SK	MB	Prairie Total	Cdn Total	% Cdn Total
Field crops	233,600	549,900	56,200	839,700	1,021,700	82%
Cereals	154,100	379,000	41,600	574,700	653,600	88%
Pulses	61,400	75,500	4,100	141,000	151,000	93%
Oilseeds	6,400	79,700	4,500	90,700	140,500	65%
Other field crops*	11,600	15,600	6,000	33,200	76,600	43%
Pasture, forage and natural areas	306,300	607,900	59,100	973,400	2,043,700	48%
Fruits and vegetables	2,100	1,900	2,400	6,400	68,600	9%
Uncategorized	1,700	2,600	200	4,500	16,800	27%
TOTAL	**543,700**	**1,162,300**	**117,900**	**1,824,000**	**3,150,800**	**58%**

* Other field crops include amaranth, borage, buckwheat, corn, hemp and quinoa, as well as field crops with no details listed.

Pasture, forage and natural areas is the largest category at over 900,000 acres, representing 54% of Prairie organic acreage. Field crops represent 46% of Prairie acreage and an important part of organic lands. Seventy percent of organic field crop acreage in the region is cereals. Pulses make up eight percent of organic acres in the Prairies but those acres represent 93% of all organic pulse acres across Canada. At the other end of the spectrum, only nine percent of Canada's organic fruit and vegetable acreage is in the Prairies.

Table 2 provides a look at the main acreage categories in the Prairies from 2015 to 2017. All categories show growth in acreage since 2015 with the exception of fruits and vegetables; however, this exception has been flagged as a likely data error in 2015 with fruit and vegetable figures overestimated in 2015.

TABLE 2 | ORGANIC ACREAGE IN THE PRAIRIES BY CATEGORY, 2015 – 2017

	2015	2016	2017	Growth 2015-2017
Field crops	664,600	762,300	839,700	26%
Cereals	499,000	564,900	574,700	15%
Pulses	88,500	117,500	141,000	59%
Oilseeds	69,100	63,800	90,700	31%
Other field crops	7,900	16,100	33,200	318%
Pasture, forage and natural areas**	734,200	921,300	973,400	33%
Fruits and vegetables	11,600*	5,500	6,400	-45%
Uncategorized	-	4,700	4,500	n/a
PRAIRIE TOTAL	**1,410,400**	**1,693,800**	**1,824,000**	**29%**

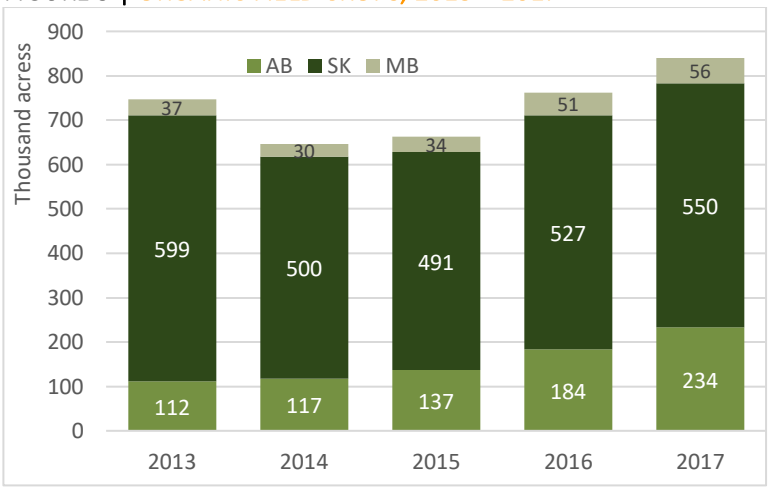
*Suspected data error.
** The category includes perennial and annual forages, permanent pasture, fallow land, green manures, wild collection and natural areas.

Pulses comprise only eight percent of total organic Prairie acreage, but have had notable growth (59%) since 2015. The greatest growth (318%) was recorded in the 'Other field crops' category. This category includes hemp, corn, buckwheat and other field crops with no details stated. This growth was driven in large part by the expansion of organic hemp acreage; over half of the increase in 'Other field crop' acreage between 2016 and 2017 was hemp. Organic hemp acreage in the Prairies more than tripled from 5,000 acres in 2015 to 18,800 acres in 2017. The Prairies account for 79% of Canada's organic hemp acreage.

DETAILED ACREAGE

FIELD CROPS

FIGURE 9 | ORGANIC FIELD CROPS, 2013 – 2017



Field crops are important to the organic sector in the Prairies. This category includes cereals, pulses, and oilseeds, and other field crops like hemp and corn. In aggregate, this category declined between 2013 and 2014, but has been on the rise ever since. The dip was primarily due to drops in SK organic field crop acreage, which still has not surpassed 2013 numbers. Alberta has been on a steady rise and MB's acreage dipped but now exceeds 2013 figures.

CEREALS

Cereals are the largest subcategory of field crops at 64% of national field crop acreage. The Prairies are a leader in all cereal acreage due to climate and established markets for cereal production. This crosses over to the organic sector; 88% of Canada's organic cereals are grown in the Prairies and the numbers have been rising steadily in recent years. Saskatchewan is home to two-thirds of cereal acreage.

The portion of national acreage based in the Prairies varies for different crops. Ninety-one percent of organic oat acreage is in the Prairies. All recorded Kamut® acreage is in AB and SK. In the 'Other cereals' category, nearly three-quarters of acreage is located outside of the Prairies; this is predominantly cereal acreage with no details listed in ON and QC.

Figure 12 shows changes within the top cereal categories of wheat, oats and barley. Wheat and barley acreage have been increasing. Oats acreage has shown more fluctuation, which is not uncommon. When certain areas dramatically increase production — for example, a large increase in oat acreage in Mackenzie County, AB — other regions are likely to decrease production in response.

TABLE 3 | ORGANIC CEREAL ACREAGE BY PROVINCE, 2017

	AB	SK	MB	Prairie Total	Cdn Total	% Cdn Total
Barley	31,600	41,000	5,200	77,800	87,200	89%
Kamut®	2,500	42,400	-	44,900	44,900	100%
Oats	68,500	107,700	9,100	185,300	204,000	91%
Rye	2,000	13,800	3,700	19,500	25,500	77%
Wheat	48,800	169,300	23,500	241,500	270,200	89%
Other cereals*	800	4,900	100	5,800	21,800	26%
CEREAL TOTAL	**54,100**	**379,000**	**41,600**	**574,700**	**653,600**	**88%**

* Other cereals include millet, triticale, mixed grain and other cereals with no details listed.

FIGURE 10 | TOTAL ORGANIC CEREAL ACREAGE, 2013 – 2017

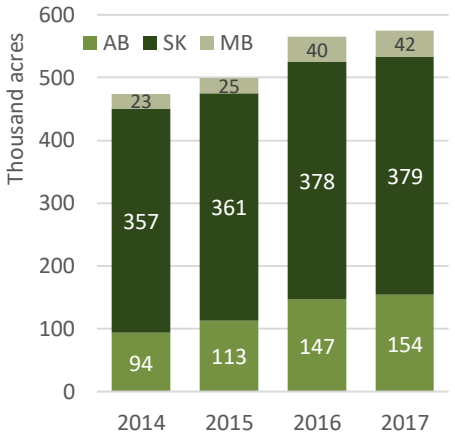
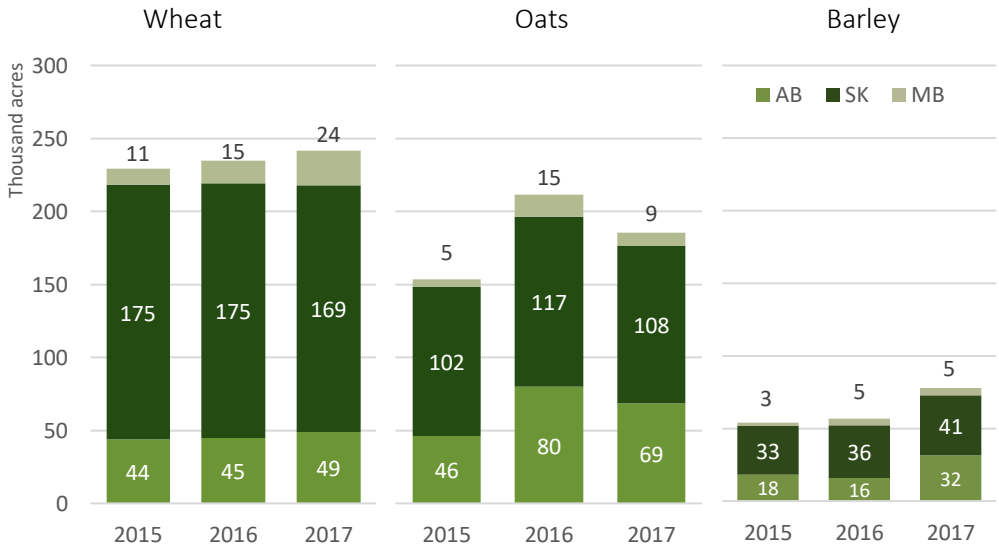


FIGURE 11 | ORGANIC WHEAT, OAT AND BARLEY ACREAGE, 2013 – 2017



PULSES

Pulses are the edible seeds of plants in the legume family and are harvested when dried. Pulses are a top organic export from Canada. Ninety-three percent of Canada's organic pulse acreage is in the Prairies, including all organic lentils and 95% of organic dried peas. The category has increased significantly in the last three years, from under 90,000 acres to 141,000 in 2017. In terms of total acreage, dried peas are the largest category in the Prairies at 91,000 acres and have seen a steady increase since 2015. Lentils have less than half the acreage of peas and experienced a slight drop between 2016 and 2017.

All organic lentil acres in Canada are in the Prairies and 90% are in SK. Pea acreage has seen dramatic growth, driven by expansion in AB. With the addition of over 30,000 pea acres in 2017, AB has now surpassed SK in pea acreage.

TABLE 4 | ORGANIC PULSE ACREAGE BY PROVINCE, 2017

	AB	SK	MB	Prairie Total	Cdn Total	% Cdn Total
Dried beans	1,100	1,700	200	2,900	5,500	53%
Lentils	3,500	38,600	100	42,200	42,200	100%
Dried peas	56,300	33,700	1,300	91,300	96,300	95%
Other pulses*	600	1,500	2,500	4,600	7,000	66%
PULSE TOTAL	**61,415**	**75,526**	**4,072**	**141,013**	**150,952**	**93%**

* Other pulses includes legumes and pulses and protein crops with no details listed. Note that soybeans are not included in pulses as they are considered an oilseed.

FIGURE 12 | TOTAL ORGANIC PULSE ACREAGE, 2015 – 2017

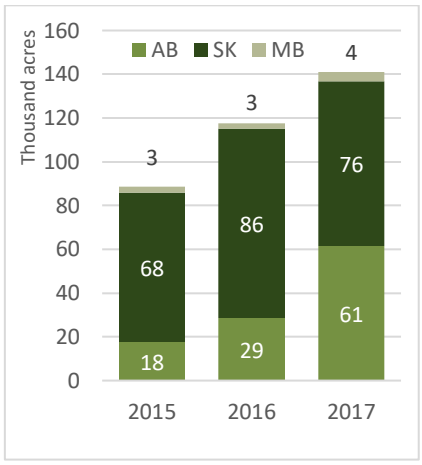
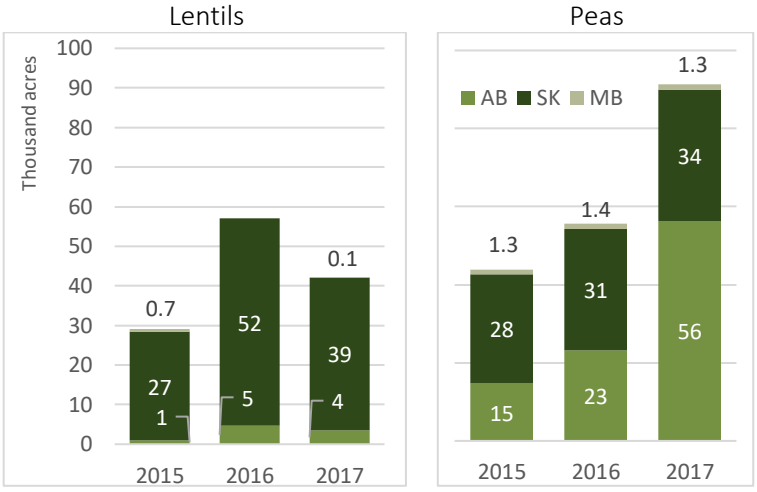


FIGURE 13 | ORGANIC LENTIL AND PEA ACREAGE, 2013 – 2017



OILSEEDS

Oilseed crops play an important role in crop rotations; they help build soil and manage disease. As high-value cash crops, oilseeds can also contribute to a farm's profitability. Nationally, over two-thirds of organic oilseed acreage is in the Prairies, with most of it located in SK specifically. Nearly all flax and mustard acreage is in the Prairies. Soybean acreage is predominantly located in ON and QC.

There is very little organic canola acreage in Canada. The Canadian Organic Standards prohibit the use of genetically engineered (GMO) crops and include separation requirements to reduce the risk of contamination in organic fields. Because of the prevalence of GMO canola in non-organic production in the Prairies, there are very few places in this region where organic canola can be grown.

TABLE 5 | ORGANIC OILSEED ACREAGE BY PROVINCE, 2017

	AB	SK	MB	Prairie Total	Cdn Total	% Cdn Total
Canola	200	-	300	400	1,500	30%
Flax	3,800	67,000	2,600	73,400	74,100	99%
Mustard	2,300	12,200	700	15,200	15,900	95%
Soybeans	-	400	1,000	1,400	48,600	3%
Other oilseeds*	100	200	-	400	500	83%
OILSEED TOTAL	**6,400**	**79,700**	**4,500**	**90,700**	**140,500**	**65%**

* Other oilseeds includes sunflower and oilseed crops with no details listed.

FIGURE 14 | TOTAL ORGANIC OILSEED ACREAGE, 2013 – 2017

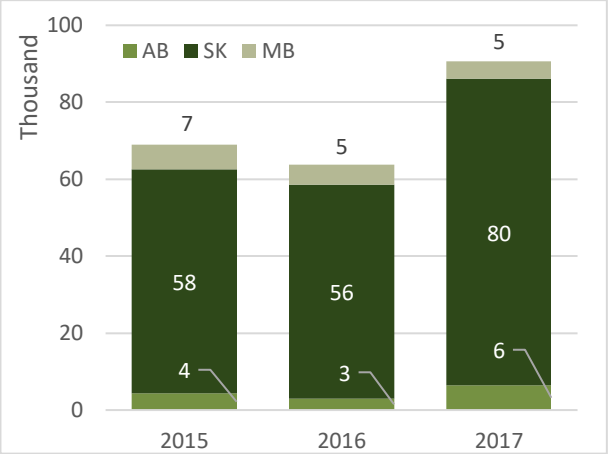
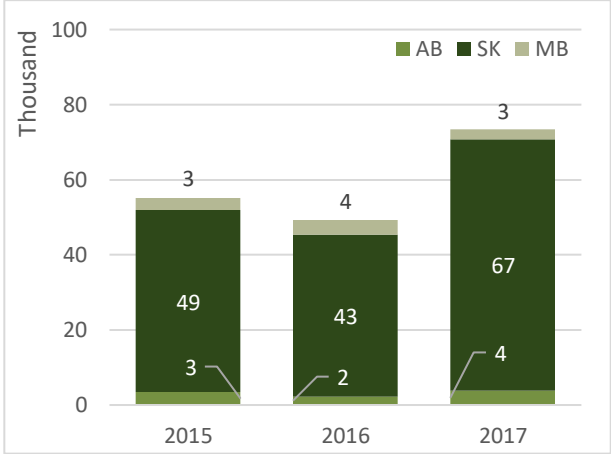


FIGURE 15 | ORGANIC FLAX ACREAGE, 2013 – 2017

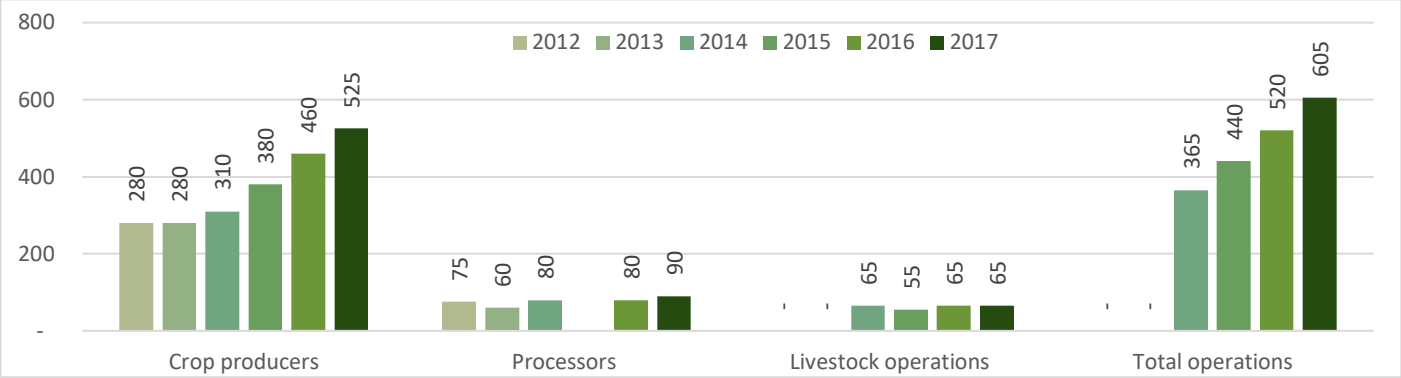


PROVINCIAL REPORTS

ALBERTA

Alberta continues to show impressive growth in the number of organic operators. Between 2014 and 2017, the province recorded the addition of 240 operations. This growth has been driven by the substantial increase in the number of organic crop producers; there have been an impressive 245 producers added since 2012. Processor and livestock operator numbers are more stable with only slight variations from year to year; processor numbers grew by about 15 from 2012 to 2017.

FIGURE 16 | OVERVIEW OF OPERATIONS IN ALBERTA, 2012 - 2017



* Livestock and operator numbers not collected in 2012 and 2013.
** Total operations is not a sum of the other categories as some operations fit into multiple categories
**2015 processor numbers removed due to likely data error.

Alberta has seen acreage gains across most categories in the last three years of data collected. Pulses have seen the greatest growth across the province with all subcategories (apart from 'Other pulses and protein crops') recording triple-digit growth rates since 2015. Peas in particular have become a very popular crop in AB with an estimated 180 growers[4] and an increase of over 30,000 acres from 2016 to 2017. This represented a 28% increase in acres between 2015 and 2017. Alberta now represents 60% of all organic peas grown in the Prairies.

Cereal crops remain the most widely grown crop in AB, with 154,000 dedicated acres in 2017. The categories with the most acres are oats and wheat, followed by barley. Collectively, cereal acreage grew 36% between 2015 and 2017, with the greatest growth recorded for barley (up 72%). The category of 'Other field crops' shows the second highest growth rate at 255%; more than half of the category's acreage is hemp at 6,000 acres.

The 'Pasture, forage and natural areas' category made a comeback in 2017, after a decrease in 2016. Fruit and vegetables have remained a small part of AB's organic lands. Note that the 2015 values were likely an overestimation due to issues in the data. The final 'Uncategorized' category was introduced to account for issues with data collection where multiple crops or land use types are listed for a single acreage value.

There are some drops here and there, mostly within the 'Other' subcategories (e.g., 'Other cereals', 'Other oilseeds'). This might be due to increasing detail in the data, which means fewer items slotted into the 'No details provided' categories within the 'Other' categories.

[4] Data provided by Organic Alberta.

TABLE 6 | ALBERTA ORGANIC ACREAGE, 2015 - 2017

	2015	2016	2017	Change 2015-2017	% Change 2015-2017
Field crops	**137,900**	**184,000**	**233,600**	**95,700**	**69%**
Cereals	**113,200**	**147,200**	**154,100**	**40,900**	**36%**
Barley	18,400	16,100	31,600	13,200	72%
Kamut®	1,800	2,800	2,500	700	41%
Oats	46,000	79,800	68,500	22,500	49%
Rye	2,000	2,300	2,000	(<100)	(3%)
Wheat	43,700	44,700	48,800	5,000	12%
Other cereals	1,300	1,500	800	(500)	(36%)
Pulses	**17,600**	**28,700**	**61,400**	**43,800**	**249%**
Dried beans	500	800	1,000	600	132%
Lentils	1,000	4,700	3,500	2,500	255%
Dried peas	14,800	23,200	56,300	41,500	281%
Other pulses and protein crops	1,400	-	600	(800)	(56%)
Oilseeds	**4,300**	**3,000**	**6,400**	**2,100**	**49%**
Canola	200	300	200	(<100)	(30%)
Flax	3,400	2,300	3,800	400	11%
Mustard	200	400	2,300	2,200	1345%
Soybeans	-	-	<100	<100	n/a
Other oilseeds	500	500	100	(300)	(70%)
Other field crops*	**2,800**	**5,200**	**11,600**	**8,800**	**312%**
Hemp	2,400	2,500	6,000	3,600	149%
Other field crops*	400	2,600	5,600	5,200	1,337%
Pasture, forage and natural areas**	**281,400**	**247,200**	**306,300**	**25,000**	**9%**
Fruits and vegetables	**6,400**	**2,000**	**2,100**	**(4,200)**	**(67%)**
Uncategorized	**n/a**	**4,700**	**1,700**	**n/a**	**n/a**
TOTAL	**425,700**	**438,000**	**543,800**	**118,000**	**28%**

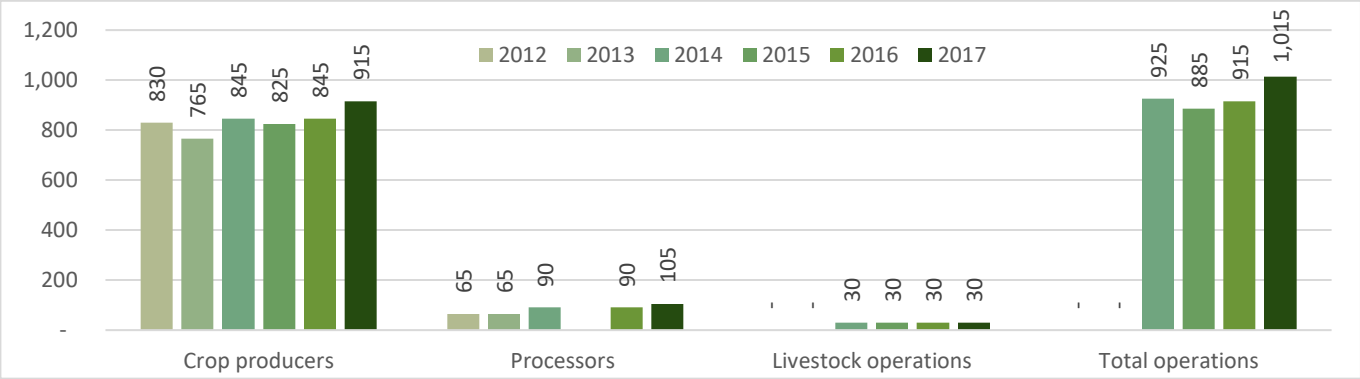
* Other field crops include hemp, corn, buckwheat and other field crops with no details listed.
**This category includes perennial and annual forages, permanent pasture, fallow land, green manures, wild collection and natural areas.

For more resources and information on organics in Alberta, visit the Organic Alberta website: www.organicalberta.org.

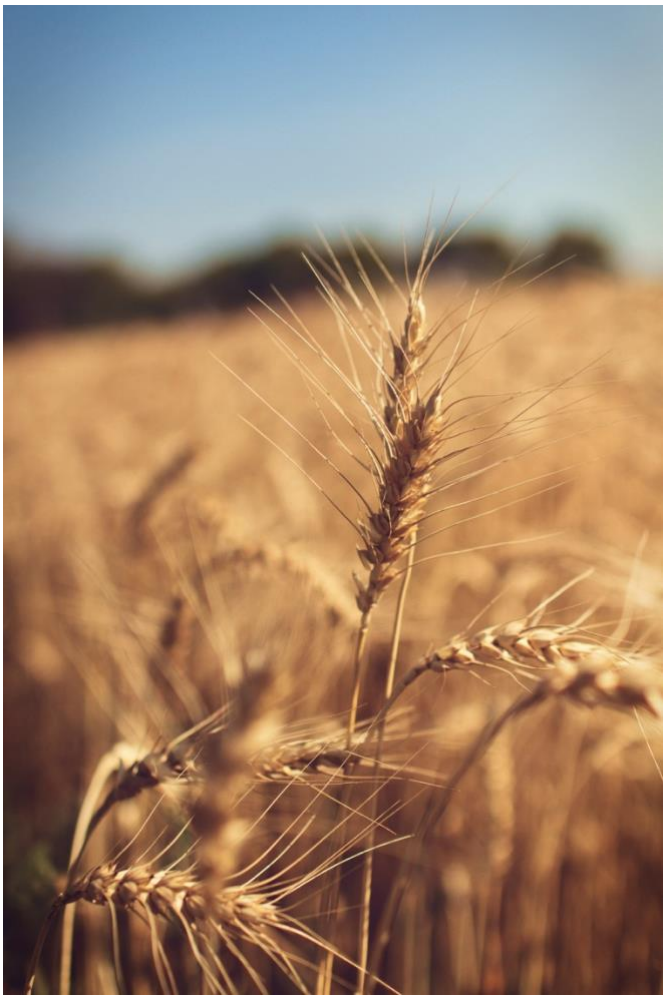
SASKATCHEWAN

Saskatchewan continues to be a key producer of organic products and has the second largest number of organic operations in Canada (behind QC and tied with ON). Nationally, SK is home to 19% of crop producers, six percent of processors, four percent of livestock operations and 16% of total operations. The number of crop producers has been increasing steadily, reaching 915 in 2017. The number of processors has also increased, reaching 105 in 2017. Livestock operations have been stable since tracking began. The total number of organic operations reached 1,015 in 2017.

FIGURE 17 | OVERVIEW OF OPERATIONS IN SASKATCHEWAN, 2012 - 2017



* Livestock and operator numbers not collected in 2012 and 2013.
**2015 processor number removed due to likely data error.



Saskatchewan also stands out for having the greatest number of organic acres compared with any other region in Canada. Total organic acreage reached 1.2 million in 2017, representing 37% of Canada's total organic acres.

There were 269,000 acres added between 2015 and 2017. This represents an impressive 30% growth. Over three-quarters of the increase in acreage during that timeframe was in the 'Pasture, forage and natural areas' category. Flax and Kamut® had the next highest rate of growth of 38% and 53%, respectively. The category of 'Other field crops' showed the second highest growth rate at 255%; just under half of that acreage is hemp, with 7,800 acres.

Rye, wheat and soybean categories showed declines. Most declines, however, were within the 'Other' subcategories (e.g., 'Other cereals,' 'Other oilseeds'). It is likely that this is due to increasing detail in the data, which means fewer items slotted into the 'No details provided' categories within the 'Other' categories.

TABLE 7 | SASKATCHEWAN ORGANIC ACREAGE, 2015 - 2017

	2015	2016	2017	Change 2015-2017	% Change 2015-2017
Field crops	**492,000**	**526,900**	**549,900**	**57,900**	**12%**
Cereals	**361,300**	**377,800**	**379,000**	**17,700**	**5%**
Barley	33,200	36,000	41,000	7,800	23%
Kamut®	27,700	30,900	42,400	14,700	53%
Oats	102,300	116,700	107,700	5,400	5%
Rye	17,200	15,800	13,800	(3,400)	(20%)
Wheat	174,600	174,600	169,300	(5,300)	(3%)
Other cereals	6,200	3,800	4,900	(1,300)	(21%)
Pulses	**68,200**	**86,300**	**75,500**	**7,300**	**11%**
Dried beans	200	2,500	1,700	1,500	750%
Lentils	27,400	52,300	38,600	11,200	41%
Dried peas	27,800	31,000	33,700	5,900	21%
Other pulses and protein crops	12,700	500	1,500	(11,200)	(88%)
Oilseeds	**58,200**	**55,500**	**79,700**	**21,500**	**37%**
Canola	-	300	-	-	n/a
Flax	48,500	43,100	67,000	18,500	38%
Mustard	8,400	11,400	12,200	3,800	45%
Soybeans	1,100	600	400	(700)	(64%)
Other oilseeds	300	-	200	(100)	(33%)
Other field crops*	**4,400**	**7,300**	**15,600**	**11,200**	**255%**
Hemp	2,300	2,300	7,800	5,500	239%
Other field crops*	2,100	5,100	7,800	5,700	269%
Pasture, forage and natural areas**	**396,700**	**556,600**	**607,900**	**211,200**	**53%**
Fruits and vegetables	**4,500*****	**1,900**	**1,900**	**(2,600)**	**(58%)**
Uncategorized	**n/a**	**n/a**	**2,600**	**n/a**	**n/a**
TOTAL	**893,200**	**1,085,500**	**1,162,300**	**269,100**	**30%**

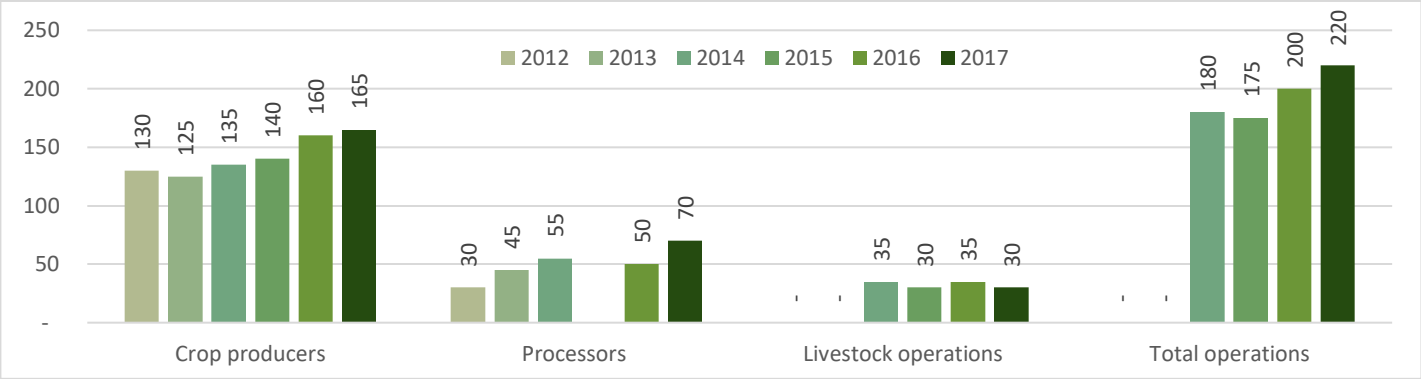
* Other field crops include hemp, corn, buckwheat and other field crops with no details listed.
**This category includes perennial and annual forages, permanent pasture, fallow land, green manures, wild collection and natural areas.
*** Data error.

For more resources and information on organics in Saskatchewan, visit the SaskOrganics website: www.saskorganics.org.

MANITOBA

Manitoba has a relatively small organic sector, with 220 operations. This isn't surprising given that it has a much smaller agricultural sector in general in comparison to AB and SK. The province has witnessed a steady increase in the number of producers from 125 in 2013 to 165 in 2017. Processors have shown a more pronounced increase from 50 to 70. Livestock operation numbers have remained stable. Overall, MB represents three percent of organic operations in Canada.

FIGURE 18 | OVERVIEW OF OPERATIONS IN MANTIOBA, 2012 - 2017



* Livestock and operator numbers not collected in 2012 and 2013.
**2015 processor number removed due to likely data error.

Manitoba is home to over 117,000 organic acres. The acreage is predominantly split between pasture, forage and natural areas (59,100 acres) and cereals (41,600 acres). Between 2015 and 2017, more than 26,000 organic acres were added in MB, representing 29% growth.

Amongst all subcategories, the greatest absolute growth was the addition of over 12,000 organic wheat acres, with substantial increases in oats and barley acreage as well. The greatest decline was the loss of 2,300 acres in the 'Other cereal' category. This could be due to increasing detail in the data, which means fewer items slotted into the 'No details provided' categories within the 'Other' categories.

Oilseed acreage has declined since 2015; however, some of this decline is likely due to crop rotation. There was major growth in the fruit and vegetables category between 2015 and 2017.

Hemp is an area of major growth in MB's organic sector. Organic hemp acreage has grown to nearly 5,000 acres from only 300 acres in 2015. This is a 1,533% increase. Processing and high-quality agronomic support for producers from the hemp processors are likely major contributors, along with the favourable climate.

TABLE 8 | MANITOBA ORGANIC ACREAGE, 2015 - 2017

	2015	2016	2017	Change 2015-2017	% Change 2015-2017
Field crops	**34,600**	**51,300**	**56,200**	**21,600**	**62%**
Cereals	**24,500**	**40,000**	**41,600**	**17,100**	**70%**
Barley	2,600	4,500	5,200	2,600	100%
Kamut®	-	-	-	-	-
Oats	5,100	15,100	9,100	4,000	78%
Rye	3,500	3,100	3,700	200	6%
Wheat	10,900	15,300	23,500	12,600	116%
Other cereals	2,400	2,000	100	(2,300)	(96%)
Pulses	**2,800**	**2,500**	**4,100**	**1,300**	**46%**
Dried beans	400	1,000	200	(200)	(50%)
Lentils	700	-	100	(600)	(86%)
Dried peas	1,300	1,400	1,300	-	0%
Other pulses and protein crops	400	-	2,500	2,100	525%
Oilseeds	**6,500**	**5,200**	**4,500**	**(2,000)**	**(31%)**
Canola	-	-	300	300	n/a
Flax	3,200	3,900	2,600	(600)	(19%)
Mustard	1,500	500	700	(800)	(53%)
Soybeans	1,300	500	1,000	(300)	(23%)
Other oilseeds	500	300	-	(500)	(100%)
Other field crops	**700**	**3,600**	**6,000**	**5,300**	**757%**
Hemp	300	2,200	4,900	4,600	1,533%
Other field crops*	500	1,400	1,100	600	123%
Pasture, forage and natural areas**	**56,200**	**58,800**	**59,100**	**2,900**	**5%**
Fruits and vegetables	**800**	**1,600**	**2,400**	**1,600**	**200%**
Uncategorized	**n/a**	**n/a**	**200**	**n/a**	**n/a**
TOTAL	**91,600**	**111,700**	**117,900**	**26,300**	**29%**

* Other field crops include corn, buckwheat and other field crops with no details listed.
**This category includes perennial and annual forages, permanent pasture, fallow land, green manures, wild collection and natural areas.

For more resources and information on organics in Manitoba,
visit the Manitoba Organic Alliance website: www.manitobaorganicalliance.com.

Manitoba Organic Alliance