

ORGANIC AGRICULTURE IN THE PRAIRIES

2015 STATISTICS



Report by the Canada Organic Trade Association

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prairie organic
grain initiative



Manitoba Organic Alliance



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Executive Summary

Organic Agriculture in the Prairies

In 2015, there were an estimated 1,499 certified organic operations in the Prairies, with over 60 operations undergoing transition to organic certification. Prairie operations account for nearly 30% of all organic operations across Canada, signifying the importance of the region in Canada's organic sector. The Prairies have significant production of organic grains and pulses, as well as large areas devoted to organic pasture and forage crops.

Quick Facts

- There are more certified organic operations in the Prairies than ever before, with 1,499 operations across the Prairies.
- Nearly 30% of Canadian certified organic operations and one-third of organic producers are in the Prairies.
- The Prairies are home to half of Canada's organic land, totaling to 1.4 million acres.
- Cereals (35%), and Pasture & Forage crops (46%) are the largest segments of Prairie organic lands.
- 94% of all organic pulse acreage in Canada is in the Prairies.
- The number of organic processors has declined across Canada (-2.8%), including across the Prairie provinces.

Purpose

This is the second year that there has been a Prairie organic report, responding to the demand for organic sector information specific to the Prairie provinces. Providing data and analysis allows for businesses to proactively plan, take advantages of opportunities as well as plan for supply changes. Having access to better data supports policy and programming initiatives that aim to develop, improve and grow the organic sector. Additionally, it can help inform the allocation of resources such as funding or technical assistance to ensure that the support is distributed to the most appropriate areas of the sector.



Whether the information is used for educational programs, supporting policy and programming efforts or general interest, this report is a useful resource for the organic sector in the Prairies. Data from this report is used by the Prairie Organic Grain Initiative and the provincial organic associations.

As a result of this data collection and analysis, the prairie organic sector is benefitting in the following ways:

- **Programming:** Being a resilient and vibrant sector means being pro-active rather than reactive. Knowing how many farmers are in transition allows provincial associations to know where the sector may be heading and adjust programs accordingly.
- **Business planning:** When provincial associations communicate trends to their members, the data allows businesses in the organic sector to plan, take advantage of opportunities and prepare for future challenges.
- **Policy work:** This report supports engagement with the government and policy asks that rely on an understanding of the current trends and opportunities within the organic sector. Further, robust statistics show that the organic sector is a well-organized, professional sector that should be properly supported.

Data source



This report is based on data collected and analyzed annually by the Canada Organic Trade Association (COTA). Organic certification bodies across Canada and the U.S. voluntarily supply the operation and acreage data to COTA. The Canadian Organic Growers previously compiled the data with COTA taking over the data collection responsibility in 2013.

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 big thank you to:

CCOF
CCPB SRL
Centre for Systems Integration (CSI)
Certified Organic Association of BC (COABC)
Ecocert
Global Organic Alliance (GOA)
International Certification Services Inc. (ISC)
Manitoba Organic Alliance
Oregon Tilth

Organic Alberta
Organic Crop Improvement Association (OCIA)
Organic Producers Association of Manitoba (OPAM)
Pacific Agricultural Certification Service (PACS)
Pro Cert Organic
QAI
SaskOrganics
TransCanada Organic (TCO) Cert

Report notes:

- In certain cases, percentages below 5% are excluded from charts for visual clarity.
- Because only whole numbers are presented for the acreage data, rounding may cause the 'total' columns not to equal the exact sum of the individual columns.
- Acreage refers to land area measured in acres.

Organic Operations in the Prairies

In 2015, there were a total of 1,499 certified organic operations across the Prairie provinces, representing nearly 30% of all Canadian operations. Most of the Prairie's certified operations are in Saskatchewan (59%), followed by Alberta (29%) and Manitoba (12%).

Table 1 | Overview of Organic Operations in the Prairies, 2015

	Certified Primary Producers	Certified Livestock Operations	Certified Processors/ Handlers	Total Certified Organic Operations*	In-transition Producers**
Alberta	380	55	57	439	33
Saskatchewan	824	31	56	883	27
Manitoba	138	32	47	177	4
Prairie Total	1,342	118	160	1,499	64

* Note that total certified organic operations is not a sum of the other preceding columns as some operations fall into multiple operation types (e.g. livestock and field crop producers)
 ** Total certified organic operations does not include 'in-transition producers'

Primary Producers

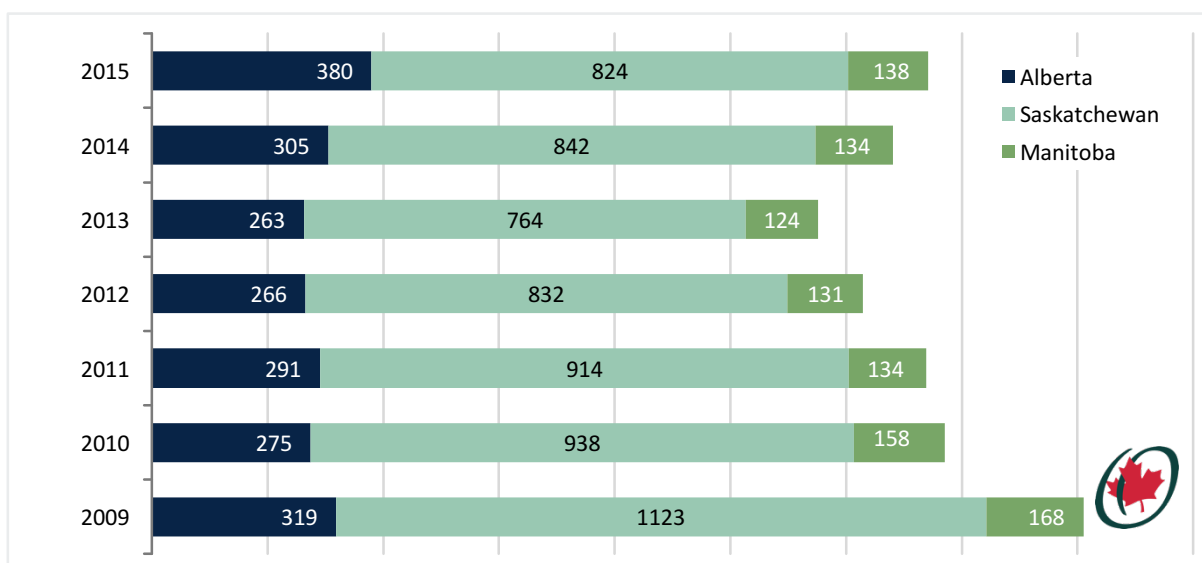
The number of certified organic operations in Canada has surpassed the previous peak of 3,914 in 2009, reaching 4,045 producers in 2015. The number of primary producers in the Prairies has been climbing since 2012, but has not yet exceeded 1,610 recorded in 2009. This suggests that the growth in the number of organic producers in the Prairies is not advancing at the same rate as other regions of the country, confirmed by the decline in Prairie total as a percentage of the Canadian total.

Table 2 | Primary Producers of Organics in the Prairies, 2009-2015

	2009	2010	2011	2012	2013	2014	2015
Prairie Total	1,610	1,371	1,339	1,229	1,151	1,281	1,342
Canadian Total	3,914	3,732	3,694	3,590	3,513	3,780	4,045
% of Cdn Total	41.13%	36.74%	36.25%	34.23%	32.76%	33.89%	33.18%

The distribution of producers across the Prairie provinces has remained stable over the years. However, in 2015, Alberta had a notable increase in producers relative to the other provinces with 75 additional producers compared with 2014. Manitoba added 4 new producers while Saskatchewan's total producers declined. This represents a shift to a slightly higher proportion of producers in Alberta compared to the other Prairie provinces.

Figure 1 | Number of Certified Primary Producers in the Prairies
2009-2015



Source: Canadian Organic Growers; Canada Organic Trade Association

Processors and Handlers

Organic processors and handlers refer to a spectrum of organic operations, including millers, seed cleaners, abattoirs, brokers/buyers, truckers, baggers and packagers. According to COTA data, the number of processors and handlers declined slightly in 2015, nationally. This trend also appeared in the Prairies with a loss of 65 processors between 2014 and 2015. The decline was most prominent in Saskatchewan, but all provinces similarly showed declines. It is possible that this decline may be attributed to operations who switched Certification Bodies during the data collection period and were thus missed within the analysis. Because of this possibility, the results from the 2016 data will be monitored to see whether the decline is a data collection issue or an actual trend.

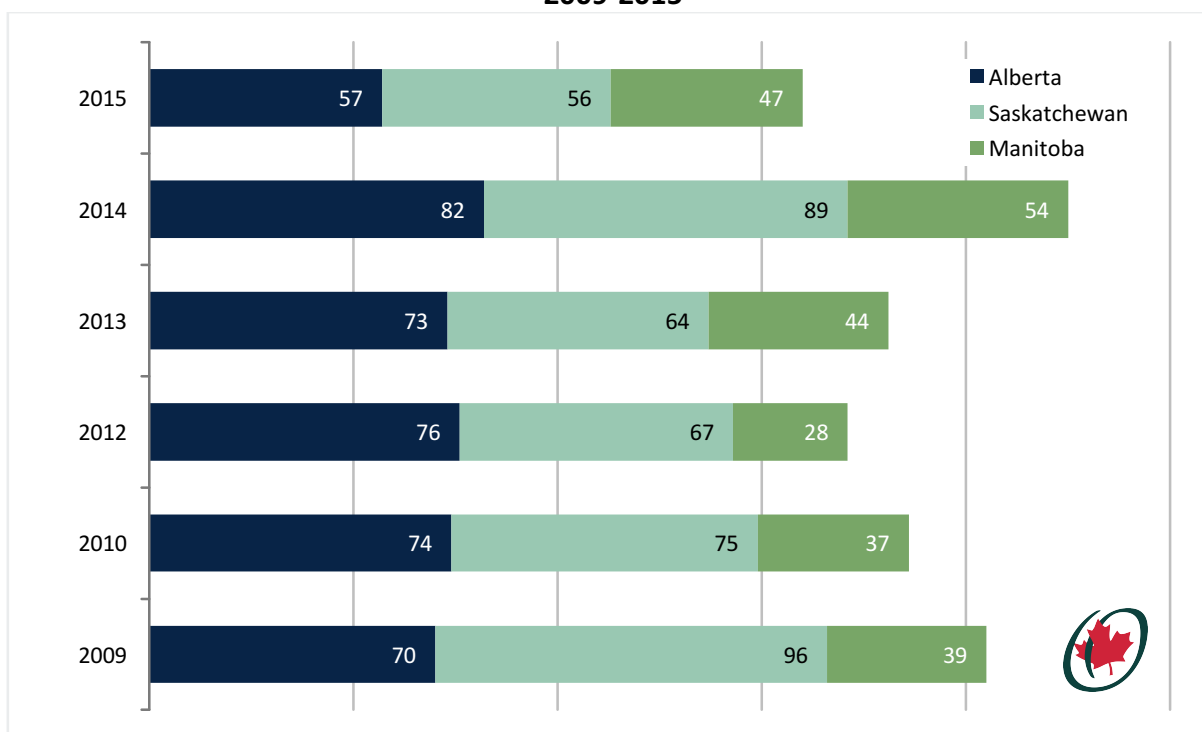
Table 3 | Number of Organic Processors and Handlers* in the Prairies, 2009-2015

	2009	2010	2011**	2012	2013	2014	2015
Prairie Total	205	186	n/a	171	181	225	160
Cdn Total	1,195	1,115	993	1,237	1,446	1,581	1,538
% of Cdn Total	17.15%	16.68%	n/a	13.82%	12.52%	14.23%	10.40%

* This table and subsequent graph pertain to processors across the whole spectrum of organics, including millers, seed cleaners, abattoirs, broker/buyers, truckers, baggers, and packagers.

** No data for organic processors and handlers operating in the Prairies for 2011 was found.

Figure 2 | **Number of Organic Processors and Handlers in the Prairies, 2009-2015**



Source: Canadian Organic Growers; Canada Organic Trade Association

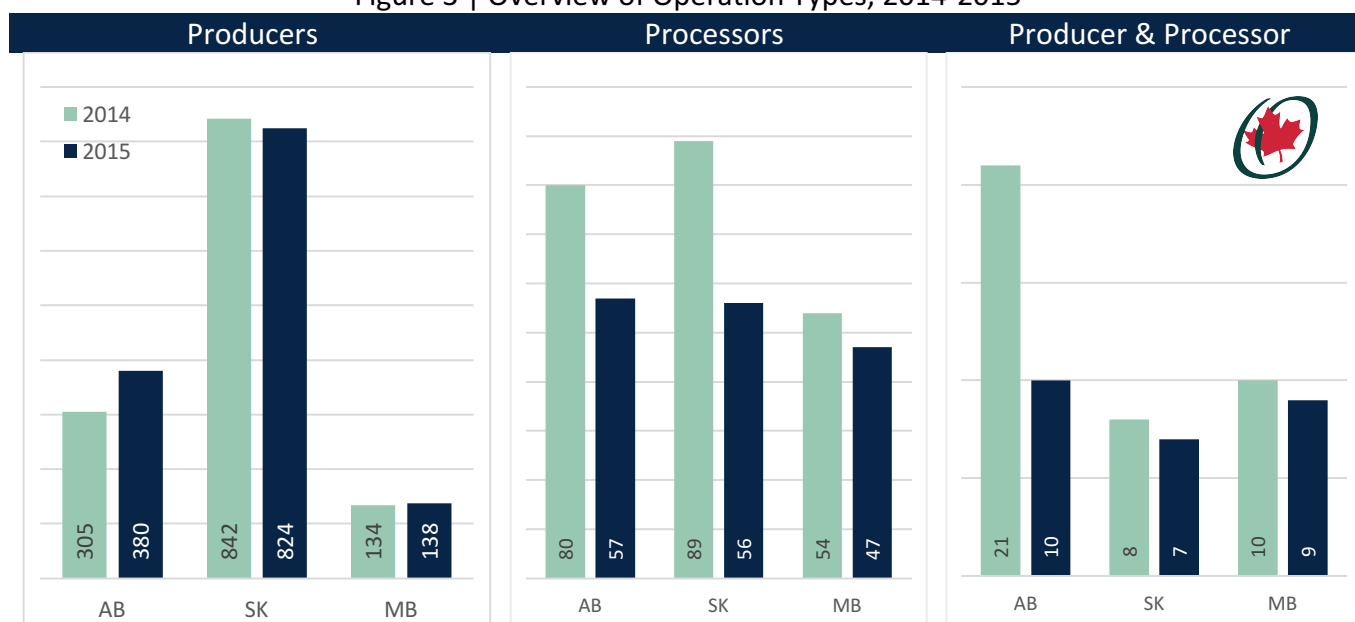
* No data for organic processors and handlers operating in the Prairies for 2011 is available.

Table 4 | **Breakdown of Certified Organic Operations, 2014-2015**

	Total Certified Crop/Livestock Operations		Total Certified Processors		Total Involved in both Processing and Producing	
	2014	2015	2014	2015	2014	2015
Alberta	311	380	80	57	21	10
Saskatchewan	843	824	89	56	8	7
Manitoba	134	138	54	47	10	9

Along with the decline in processors, there was a slight decrease in those operations involved in both processing and producing. This decline was most prominent in Alberta, whereas Saskatchewan and Manitoba only reported one less than 2014.

Figure 3 | Overview of Operation Types, 2014-2015



Source: Canada Organic Trade Association

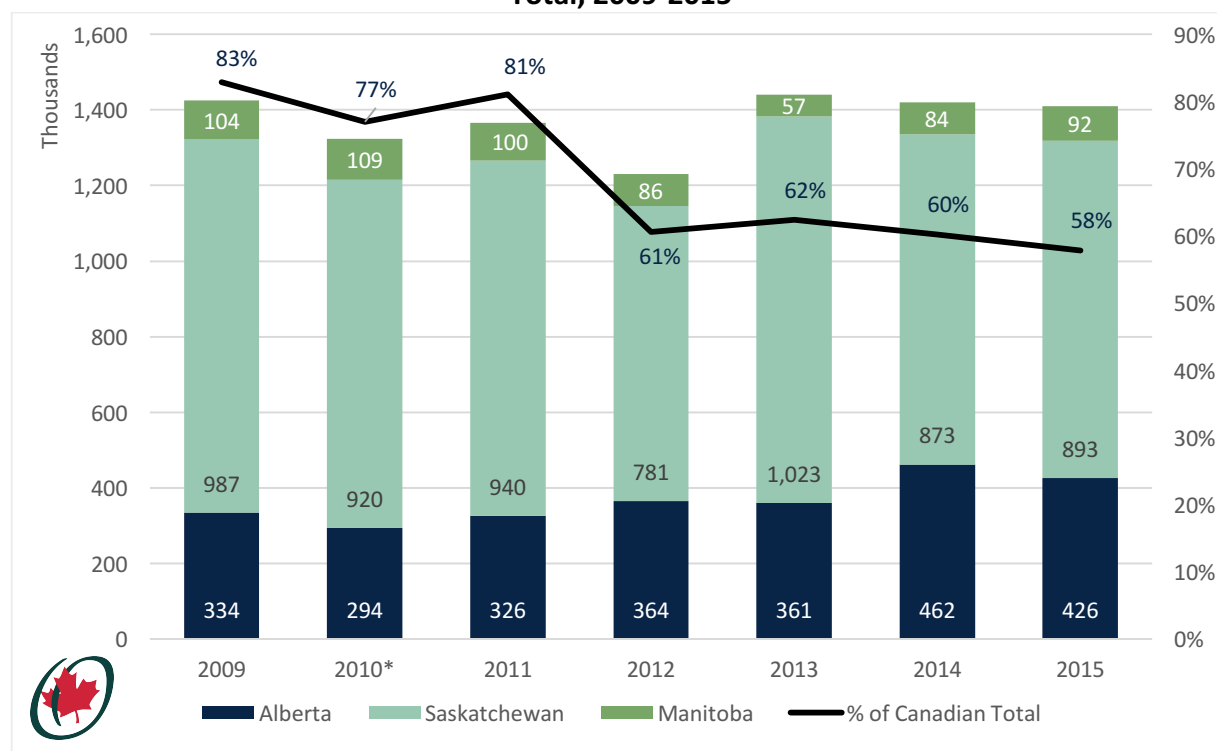
Organic Acreage in the Prairies

Prairie organic acreage reached 1.41 million in 2015, accounting for half of Canada's certified organic acreage. Since 2009, acreage in this region has remained stable with a slight peak in 2013 of 1.44 million acres. Total acreage in the Prairies has decreased slightly since 2014. The greatest decline was in the pasture and forage categories, while fruit and vegetable acreage more than quadrupled with an addition of 9,000 acres.

Table 5 | Organic Acreage in the Prairies, 2009-2015

	2009	2010*	2011	2012	2013	2014	2015
Prairie Total	1,424,892	1,323,351	1,366,000	1,230,824	1,440,382	1,419,568	1,410,435
Cdn Total	1,738,825	1,738,825	2,078,688	2,060,568	2,147,934	2,357,197	2,433,602
% of Cdn Total	82%	76%	66%	60%	67%	60%	58%
* Estimates of acreage were required for 2010, as acreage from only a fraction of producers was recorded. Also, a Canadian total was also not reported for 2010							

Figure 4 | Organic Acreage in the Prairies by Province and as a Portion of the Canadian Total, 2009-2015



Source: Canadian Organic Growers; Canada Organic Trade Association

* Estimates of acreage were required for 2010, as acreage from only a fraction of producers was recorded. Also, a Canadian total was also not reported for 2010.

The total organic land base remains largely unchanged in the Prairies; there has been a loss of less than 1% of land since 2014, along with a 5% increase in the number of producers. Saskatchewan and Manitoba had reported increases in acreage between 2014 and 2015, while Alberta's organic land base decreased.

Saskatchewan has the most certified organic acreage with over 25,000 acres added between 2014 and 2015. Manitoba acreage grew slightly. Although overall Alberta saw a loss of about 15,000 acres, this is primarily due to a 40,000+ acre loss in the grass and natural areas category. This loss is offset by a 3-fold increase in vegetable acreage and a 17% increase in field crop acreage.

Nearly half of the Prairie organic landscape is used for field crops, the majority being cereals like wheat and oats. Pasture and forage occupy about a third of the landscape followed by non-field crops such as green manures and fallow land. The largest sub-category of organic land use in Alberta is pasture, while in both Saskatchewan and Manitoba it is cereals.

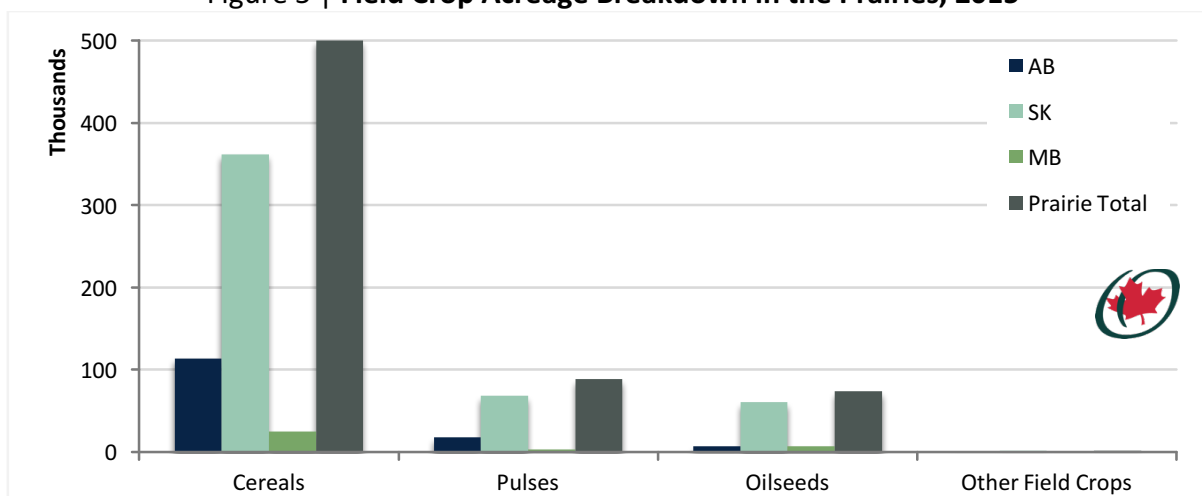
Table 6 | Certified Organic Acres by Category, 2015

Land Use Category		AB	SK	MB	Prairie Total
Field Crops	Cereals (Barley, buckwheat, kamut, mixed grain, oats, rye, wheat, other cereals)	113,500	361,884	24,989	500,373
	Pulses (Beans, legumes, lentils, peas, other pulses)	17,599	68,159	2,780	88,538
	Oilseeds (Canola, flax, hemp, mustard, soybeans, other oilseeds)	6,733	60,522	6,791	74,047
	Other Field Crops (Field crops (no details), other field crops)	109	1,477	10	1,596
Pasture & Forage	Pasture (Pasture and meadows)	172,964	88,317	17,417	278,699
	Forage (Alfalfa and alfalfa mixtures, other forage crops)	73,957	126,196	21,303	221,456
Fruits & Vegetables		6,356	4,454	833	11,643
Other	Non-Field Crops (Fallow land, green manures, manures, wild crafting, wild rice and bush)	28,010	159,088	15,150	202,248
	Grass & Natural Areas (Grass, grassland, natural areas, ecological areas)	6,427	23,062	2,344	31,833
TOTAL		425,656	893,161	91,618	1,410,435
*Subcategories - in brackets - are only broken out within the report for cereals, pulses and oilseeds.					

Field Crops

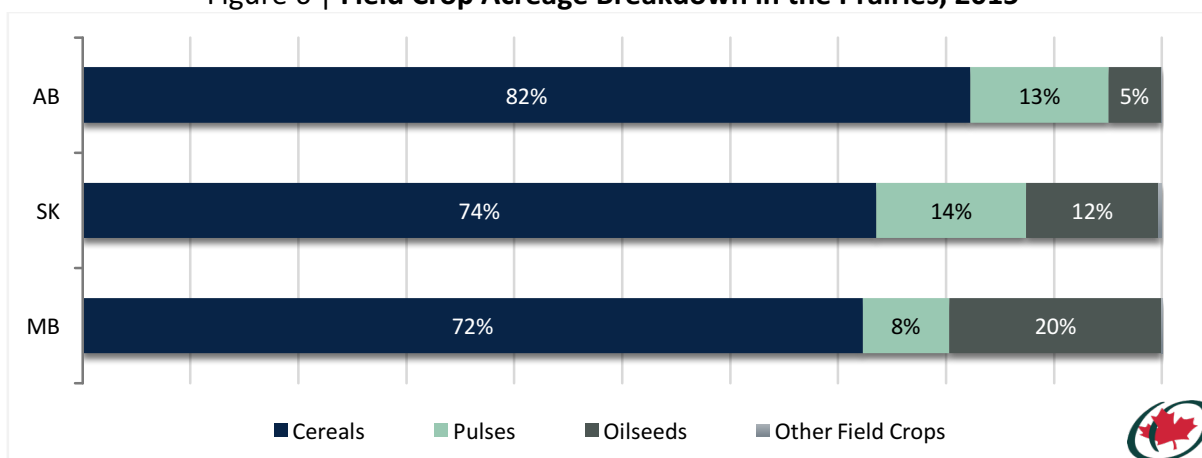
Cereals are the largest subcategory of field crops in the Prairies (75%) and are mostly located in Saskatchewan (72%). Manitoba has the lowest total field crop acreage but a relatively greater proportion of organic land (20%) dedicated to oilseeds compared to Alberta (<5%) and Saskatchewan (<2%).

Figure 5 | Field Crop Acreage Breakdown in the Prairies, 2015



Source: Canada Organic Trade Association

Figure 6 | Field Crop Acreage Breakdown in the Prairies, 2015



Source: Canada Organic Trade Association

The following three sections provide greater details on the sub-categories of field crops: cereals, pulses and oilseeds.

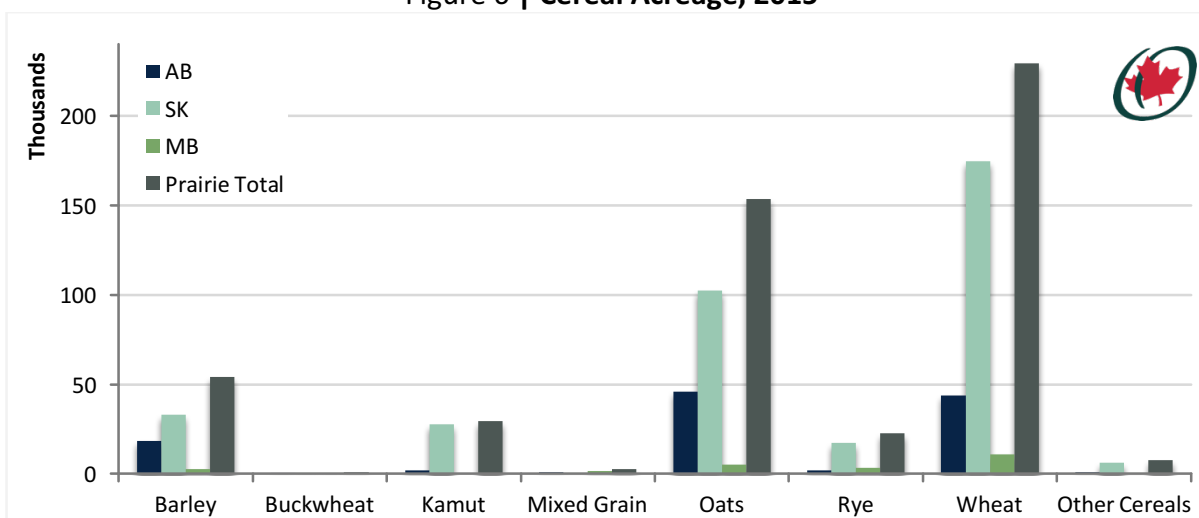
Cereals

Wheat is the largest category of organic cereals across the Prairies, accounting for 46% of all organic cereal acreage. Wheat acreage expanded by about 20,000 acres between 2014 and 2015. Similarly, oat acreage also increased by 20,000 acres and remains at approximately 30% of organic cereal acreage in the region. Many of the other categories (e.g., barley, buckwheat, kamut and mixed grain) declined slightly between 2014 and 2015.

Table 7 | Acreage Devoted to Cereals, 2015

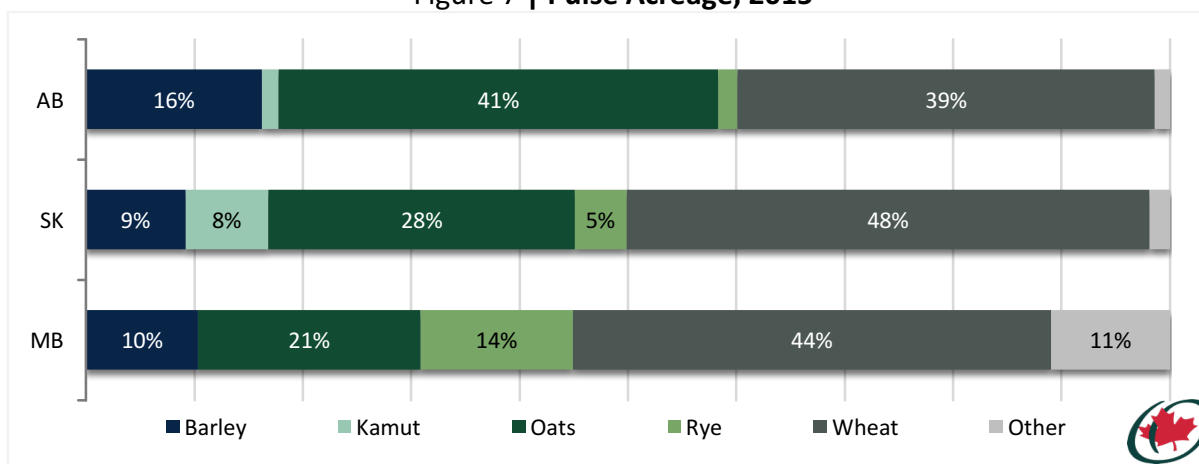
	AB	SK	MB	Prairie Total
Barley	18,415	33,218	2,582	54,215
Buckwheat	63	567	319	949
Kamut	1,760	27,698	-	29,458
Mixed Grain	735	100	1,739	2,574
Oats	46,014	102,301	5,129	153,444
Rye	2,032	17,239	3,509	22,780
Wheat	43,712	174,633	11,029	229,374
Other Cereals	769	6,128	682	7,579
TOTAL	113,500	361,884	24,989	500,373

Figure 6 | Cereal Acreage, 2015



Source: Canada Organic Trade Association

Figure 7 | Pulse Acreage, 2015



Source: Canada Organic Trade Association

* Due to space, 'Other' includes Buckwheat, Mixed Grains, Cereals (no details) and Other Cereals from Table 7 above.

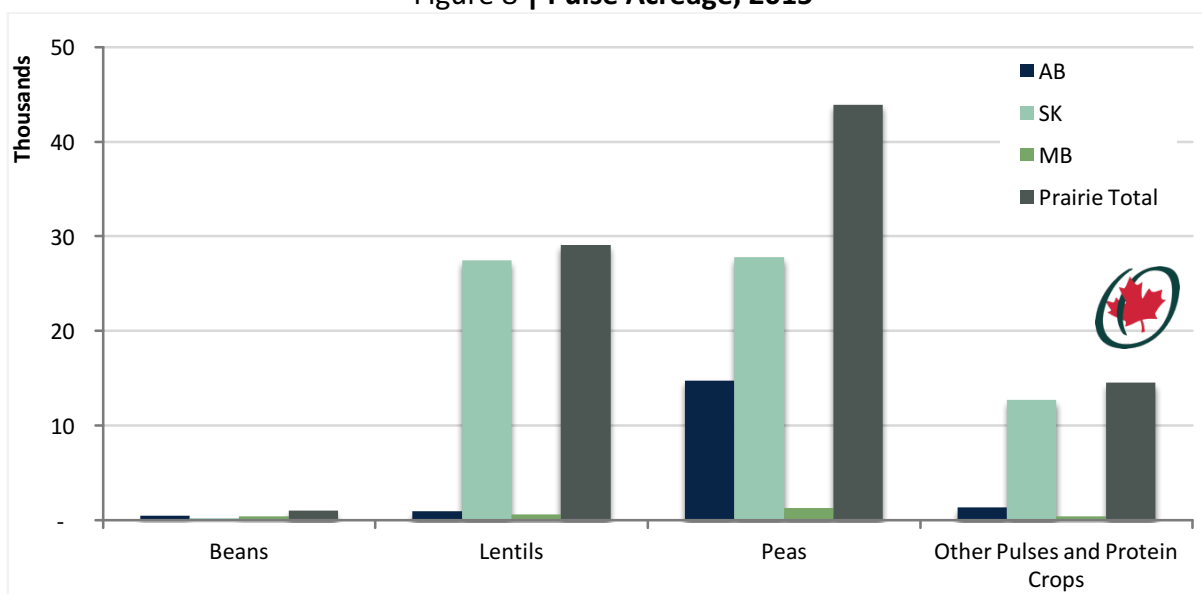
Pulses

Nearly all (94%) certified organic pulses are produced in the Prairies. Of the Prairie organic pulse acreage, 77% is in Saskatchewan. Organic field peas (i.e. not fresh peas) occupy half of the organic pulse areas in the Prairies. In 2015, organic pulse acreage expanded by approximately 13,000 acres – mostly in Saskatchewan.

Table 8 | Acreage Devoted to Pulses, 2015

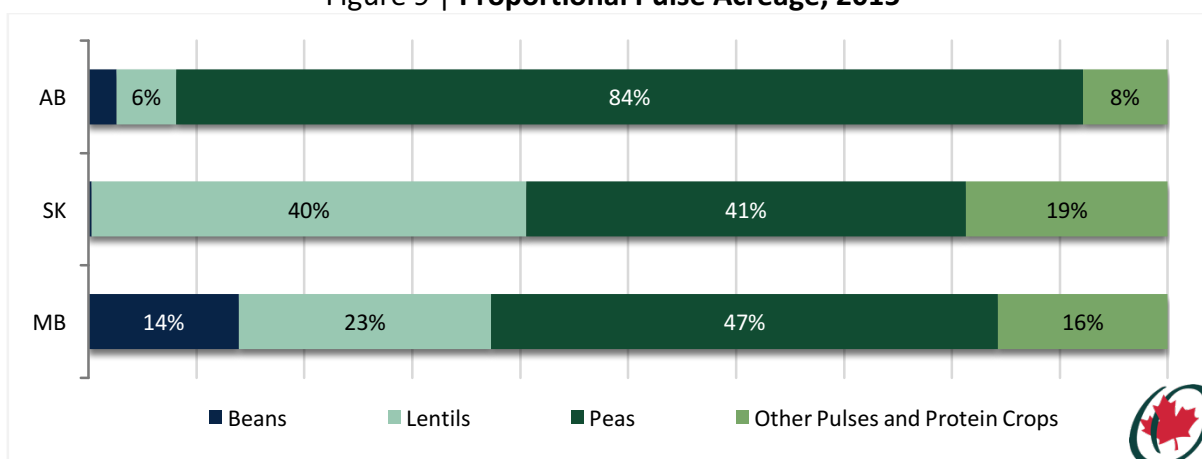
	AB	SK	MB	Prairie Total
Beans	458	191	387	1,036
Lentils	974	27,437	650	29,061
Peas	14,782	27,796	1,306	43,885
Other Pulses and Protein Crops	1385	12,735	437	14,557
TOTAL	17,599	68,159	2,780	88,538

Figure 8 | Pulse Acreage, 2015



Source: Canada Organic Trade Association

Figure 9 | Proportional Pulse Acreage, 2015



Source: Canada Organic Trade Association

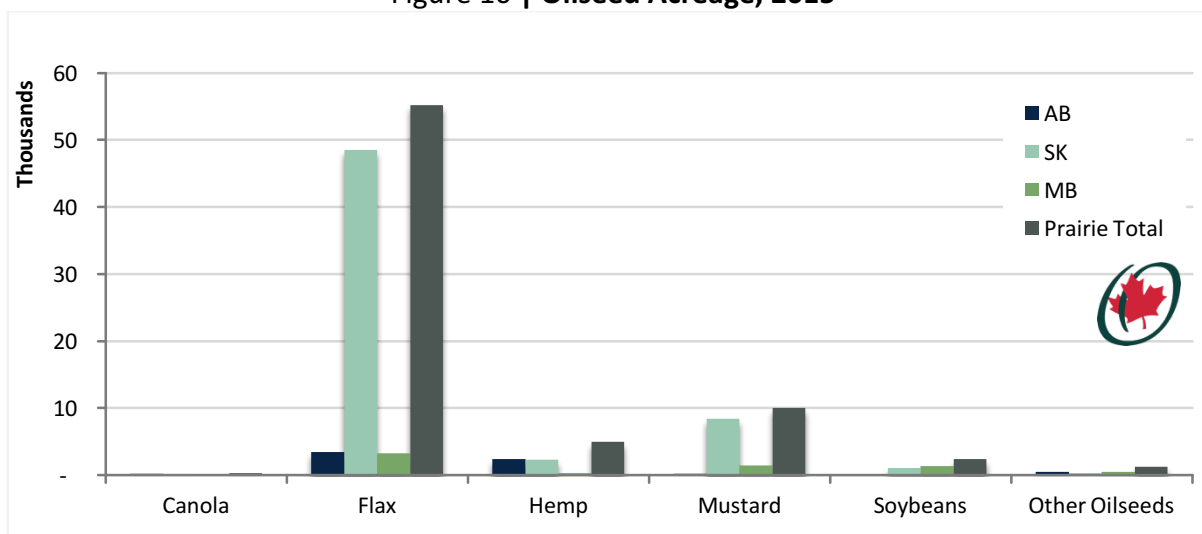
Oilseeds

Saskatchewan grows 82% of the Prairies' organic oilseed acreage. Three-quarters of organic oilseed acreage in the Prairies is for flaxseed. This is due mainly to the larger areas in Saskatchewan dedicated to flax production. Although Saskatchewan and Alberta have similar acreage devoted to hemp, hemp production is a much greater proportion of Alberta's organic oilseed acreage (36%).

Table 9 | Acreage Devoted to Oilseeds in, 2015

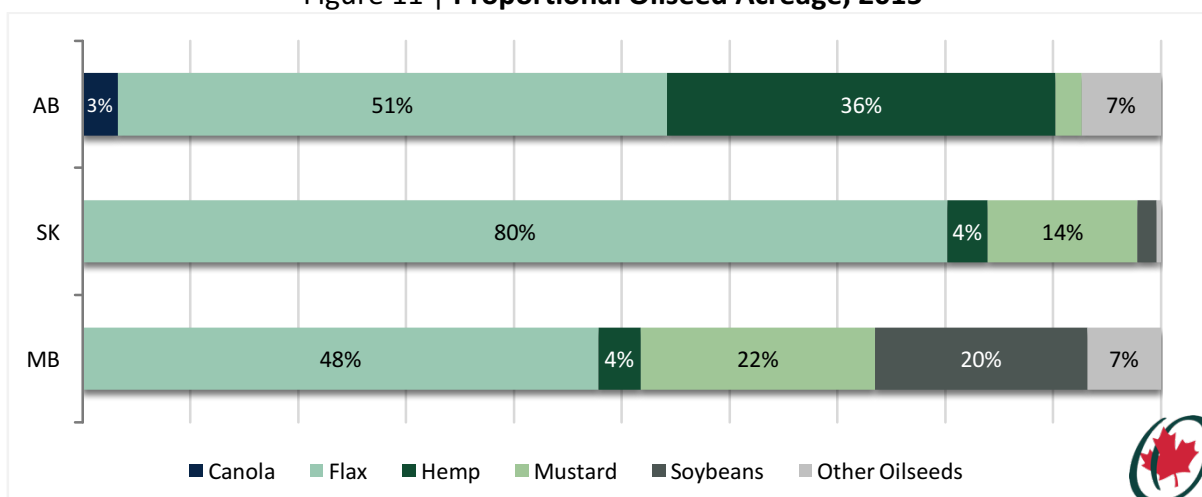
	AB	SK	MB	Prairie Total
Canola	220	20	-	240
Flax	3,429	48,508	3,249	55,187
Hemp	2,428	2,285	267	4,980
Mustard	160	8,386	1,473	10,019
Soybeans	-	1,065	1,339	2,404
Other Oilseeds	496	258	463	1,217
TOTAL	6,733	60,522	6,791	74,047

Figure 10 | Oilseed Acreage, 2015



Source: Canada Organic Trade Association

Figure 11 | Proportional Oilseed Acreage, 2015



Source: Canada Organic Trade Association

Fruits and Vegetables

Vegetable acreage in the Prairies is nearly three times higher than 2014, increasing from 4,771 to over 11,000. Vegetables remain a small portion of organic acreage in the prairies but this substantial increase deserves attention in subsequent data analyses to see whether the trend continues.

Fruits continue to be a very marginal area of organic lands, likely due to climatic barriers.

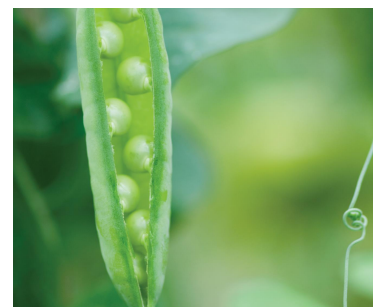


Table 10 | **Fruit and Vegetable Acreage, 2015**

	AB	SK	MB	Prairie Total
Fruit & Vegetables	6,356	4,454	833	11,643

Pasture and Forage

Pasture and forage acreage is nearly split between Alberta and Saskatchewan, with a smaller proportion (about 40,000 acres) in Manitoba.

As a result of the format that COTA receives data, there are likely some inconsistencies in the data year-to-year, particularly in the pasture and forage, and other non-field crop categories. This is because some certification body data uses broader categories that encompass multiple categories reported here, and thus require re-categorization when aggregating the data.

Table 11 | **Pasture and Forage Acreage in the Prairies, 2015**

		AB	SK	MB	Prairie Total
Pasture & Meadows	Pasture	127,176	86,541	16,691	230,409
	Meadows	45,788	1,776	726	48,290
Forage	Alfalfa and alfalfa mixtures	21,634	33,520	8,745	63,899
	Other forage crops (hay, clover & others)	52,323	92,676	12,559	157,557
TOTAL		246,922	214,513	38,720	500,155

Other Non-Field Crop Acreage

Other acreage includes both non-field crops and grass and natural areas. There are difficulties in year-to-year consistency with the other non-field crop acreage as many of these categories are challenging to delineate, and due to the nature of farming (e.g., crop rotation) land use can change often.

One example of this issue is trying to categorize green manures. If farmers plant field crops and green manures in the same field (intercropping) it may only be reported as field crop acreage despite having green manures as well. Additionally, occasionally a field was intended for field crops, but a poor yield led a farmer to plow it under (i.e. green manure) instead. These nuances reveal one of the difficulties with quantifying organic acreages.

With these issues in mind, according to the categories defined by COTA, non-field crop acreage is mostly within Saskatchewan (71%) and is predominantly fallow land. Grass and natural areas are a small portion of the other non-field crop acreage (16%), but are again concentrated in Saskatchewan (72%).

Table 12 | **Other Non-Field Crop Acreage in the Prairies, 2015**

	AB	SK	MB	Prairie Total
Non-Field Crops (fallow land, green manures, manures, wild crafting, wild rice and bush)	28,011	159,088	15,150	202,248
Grass & Natural Areas (grass, grassland, natural areas, ecological areas)	6,427	23,062	2,344	31,833
TOTAL	34,438	182,150	17,494	234,082

Organic Agriculture in Alberta

Alberta showed a 20% increase of total organic operators between 2014 and 2015, bringing the total to 439. While the number of livestock operators and processors/handlers declined slightly, there was significant growth in field crop producers.

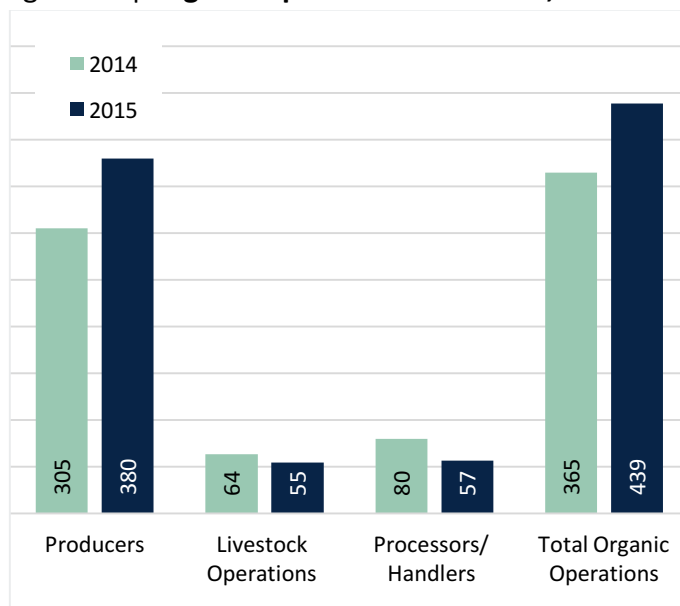
Overall, Alberta had a slight decline in organic acreage, reporting 425,656 acres in 2015. This was due to a loss of over 40,000 acres in the grass and natural areas category. This aligns with the decline in livestock operations, where a decrease in a few operations may result in the loss of large expanses of grasslands and pasture areas. On a positive note, field crop acreage increased by nearly 20,000 likely related to the increase in number of producers. Most of this increase was in the Mackenzie County region of Alberta, where there are many producers transitioning into organic grain production. Fruit and vegetable acreage also increased and is significantly higher than 2014.

Table 13 | Overview of Certified Organic Operations in Alberta, 2014-2015

	Primary Producers		Livestock Operations		Processors/ Handlers		Total Organic Operations	
	2014	2015	2014	2015	2014	2015	2014	2015
Alberta	305	380	64	55	80	57	365	439
Prairie Total	1,288	1,342	128	118	223	160	1,466	1,499

* Total organic operations is not a sum of the other preceding columns as some operations fall into multiple operation types

Figure 12 | Organic Operations in Alberta, 2014-2015



Source: Canada Organic Trade Association

Table 14 | **Alberta Acreage Breakdown, 2014-2015**

	2014	2015
Field Crops	117,241	137,941
Cereals	93,761	113,500
Barley	14,916	18,415
Buckwheat	34	63
Kamut	2,443	1,760
Mixed Grain	550	735
Oats	40,377	46,014
Rye	1,846	2,032
Wheat	31,598	43,712
Other Cereals	1,997	769
Pulses	15,964	17,599
Beans	1,141	458
Lentils	860	974
Peas	13,958	14,782
Other Pulses	5	1385
Oilseeds	4,646	6,733
Canola	670	220
Flax	2,088	3,429
Hemp	1,673	2,428
Mustard	70	160
Soybeans	33	-
Other Oilseeds	112	496
Other Field Crops	2,870	109
Pasture & Forage	244,793	246,922
Pasture & Meadows	177,509	172,964
Forage	67,284	73,957
Fruits & Vegetables	1,632	6,356
Other	78,060	34,438
Non-Field Crops	16,556	28,011
Grass & Natural Areas	61,505	6,427
GRAND TOTAL	441,727	425,656

Organic Agriculture in Saskatchewan

Saskatchewan has the greatest number of organic operations in the Prairies, however the numbers fell from 923 in 2014 to 883 in 2015. This decline occurred for primary producers as well as processors, but livestock operations increased slightly.

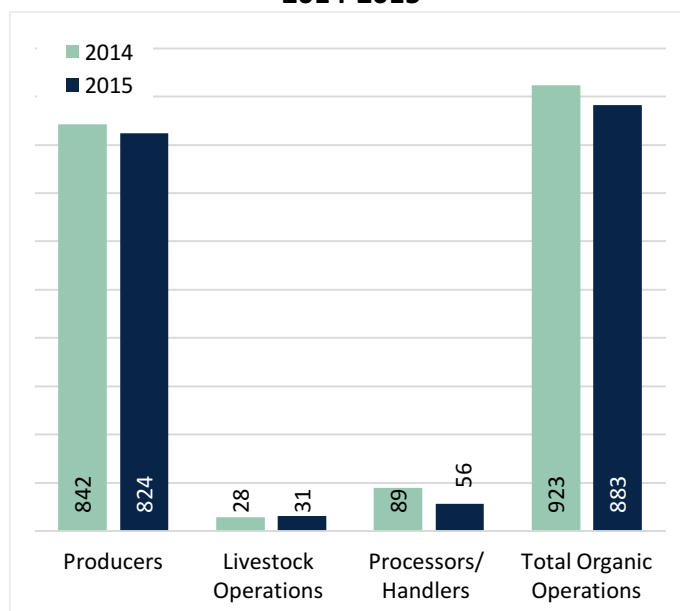
Certified organic acreage in Saskatchewan increased by 25,000 acres in 2015. Pasture and forage crops increased by 15,000 acres. Given that there are more livestock producers, it makes sense that this category grew. The loss of some certified crop producers is captured in the slight decline in field crop acreage. Similar to Alberta, Saskatchewan's vegetable acreage is five times larger than 2014.

Table 15 | Overview of Certified Organic Operations in Saskatchewan, 2014-2015

	Primary Producers		Livestock Operations		Processors/Handlers		Total Organic Operations	
	2014	2015	2014	2015	2014	2015	2014	2015
Saskatchewan	843	824	28	31	89	56	923	883
Prairie Total	1,288	1,342	128	118	223	160	1,466	1,499

* Note that total certified organic operations is not a sum of the other preceding columns as some operations fall into multiple operation types (e.g. livestock and field crop producers).

Figure 13 | Organic Operations in Saskatchewan, 2014-2015



Source: Canada Organic Trade Association

Table 16 | **Saskatchewan Acreage Breakdown, 2014-2015**

	2014	2015
Field Crops	499,982	492,043
Cereals	357,225	361,884
Barley	44,485	33,218
Buckwheat	756	567
Kamut	31,288	27,698
Mixed Grain	2,397	100
Oats	89,664	102,301
Rye	17,858	17,239
Wheat	163,850	174,633
Other Cereals	6,927	6,128
Pulses	55,186	68,159
Beans	1,280	191
Lentils	26,682	27,437
Peas	25,708	27,796
Other Pulses	1,517	12,735
Oilseeds	81,033	60,522
Canola	813	20
Flax	41,452	48,508
Hemp	3,314	2,285
Mustard	34,211	8,386
Soybeans	735	1,065
Other Oilseeds	508	258
Other Field Crops	6,538	1,477
Pasture & Forage	199,255	214,513
Pasture & Meadows	105,620	88,317
Forage	93,635	126,196
Fruits & Vegetables	714	4,454
Other	168,141	182,150
Non-Field Crops	105,164	159,088
Grass & Natural Areas	62,977	23,062
GRAND TOTAL	868,092	893,160

Organic Agriculture in Manitoba

Manitoba had a similar number of organic operations in 2014 and 2015. This suggests some maintenance of the number of operations, however there is likely an ebb and flow of producers dropping certification and others joining each year. Overall, there was a slight increase in primary producers and a decrease in processors.

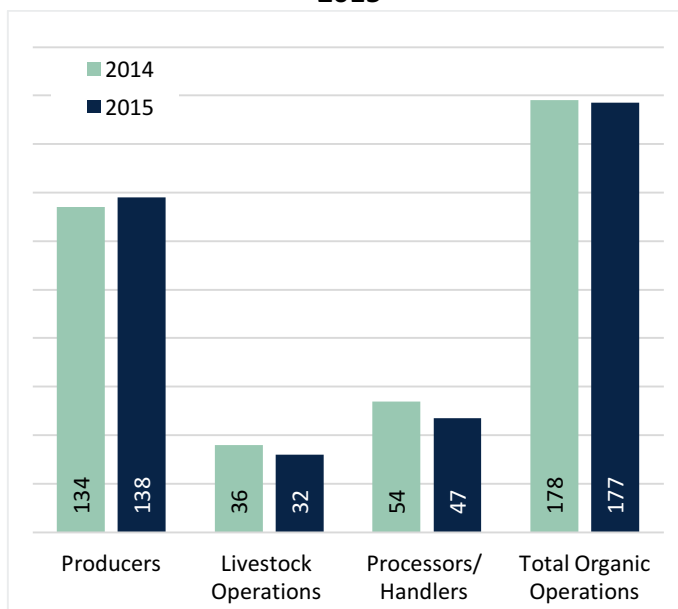
Certified organic acreage increased by nearly 10,000 with the most gains made in field crop and other non-field crop acreage. Wheat and green manure acreage was significantly expanded, while pasture and alfalfa acreage notably decreased.

Table 17 | Overview of Certified Organic Operations in Manitoba, 2014-2015

	Primary Producers		Livestock Operations		Processors/ Handlers		Total Organic Operations	
	2014	2015	2014	2015	2014	2015	2014	2015
Manitoba	134	138	36	32	54	47	178	177
Prairie Total	1,288	1,342	128	118	223	160	1,466	1,499

* Note that total certified organic operations is not a sum of the other preceding columns as some operations fall into multiple operation types (e.g. livestock and field crop producers).

Figure 14 | Organic Operations in Manitoba, 2014-2015



Source: Canada Organic Trade Association

Table 18 | **Manitoba Acreage Breakdown, 2014-2015**

	2014	2015
Field Crops	29,711	34,570
Cereals	22,766	24,989
Barley	1,964	2,582
Buckwheat	272	319
Kamut	-	-
Mixed Grain	501	1,739
Oats	6,632	5,129
Rye	2,991	3,509
Wheat	9,700	11,029
Other Cereals	706	682
Pulses	2,913	2,780
Beans	471	387
Lentils	80	650
Peas	1,708	1,306
Other Pulses	654	437
Oilseeds	2,879	6,791
Canola	-	-
Flax	2,221	3,249
Hemp	140	267
Mustard	50	1,473
Soybeans	295	1,339
Other Oilseeds	173	463
Other Field Crops	1,153	10
Pasture & Forage	36,087	38,720
Pasture & Meadows	17,475	17,417
Forage	18,612	21,303
Fruits & Vegetables	2,424	833
Other	13,894	17,494
Non-Field Crops	11,592	15,150
Grass & Natural Areas	2,302	2,344
GRAND TOTAL	82,117	91,618