SGI FAS MARKET OPPORTUNITIES ANALYSIS

MASSELINK ENVIRONMENTAL DESIGN

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Acronyms

AAFC	Agriculture and Agri-Food Canada
AGRI	BC Ministry of Agriculture
ALC	Agricultural Land Commission
ALR	Agricultural Land Reserve
ARDCorp	Agriculture Research and Development Corporation
BCAA	BC Assessment Authority
BCAC	BC Agriculture Council
BCEMB	BC Egg Marketing Board
BCMMB	BC Milk Marketing Board
BC MPA	BC Milk Producers Association
BCMoE	BC Ministry of Environment
CFIA	Canadian Food Inspection Agency
CLI	Canadian Land Inventory
CSA	Community Supported Agriculture
FIRB	Farm Industry Review Board
FPPA	Farm Practices Protection (Right to Farm) Act
GDP	Gross Domestic Product
GMO	Genetically Modified Organisms
IAF	Investment Agriculture Foundation of BC
LGA	Local Government Act
LTSA	Land Title and Survey Authority of BC
LUI	Land Use Inventory
MIR	Meat Inspection Regulation
MOA	Market Opportunities Analysis
OCP	Official Community Plan
PHSA	Provincial Health Services Authority
REF	Real Estate Foundation
SGI	Southern Gulf Islands
SSFPA	Small Scale Food Processor Association
SWOT	Strengths Weaknesses Opportunities Threats
UBCM	Union of BC Municipalities
WDM	Water Demand Model
WWOOF	Willing Workers on Organic Farms

Executive Summary

This Market Opportunities Analysis (MOA) helps to identify opportunities for the local food and farming businesses in the Southern Gulf Islands (SGI) region to thrive and contribute to a resilient local economy. It was developed using literature reviews and research; online and paper surveys; and Open Houses. The MOA is a working document that is meant to be used in conjunction with the Situation Analysis, in order to create the final Food and Agriculture Strategy.

Despite a lower number of people active in the labour force and a lower overall income than the Capital Regional District (CRD) and BC, the unemployment rate in the SGI region is low and the number of individuals employed in agriculture, forestry, fishing and hunting is higher than in the CRD and BC. A total of 92.8% of respondents indicated that they were growing their own food, which demonstrates a high level of personal food security. Additionally, when farmers were asked whether they produce food for sale, only 57% produce farm products for sale and mostly food is grown for subsistence use. That said, the SGI region is currently only 3% self-sufficiency in food, indicating copious room for the agricultural sector to expand in terms of production to meet local food needs.

Consumers are keen to purchase food locally when they aren't growing it for themselves and are willing to pay more for local food. Products that are mainly purchased are: baked goods, meat products, and preserves and pickles. Consumers would like to be able to purchase more nuts, berries, tree fruits, and flour/grains, which are potential areas for growth in production. It was discovered through high level calculations that If all the income made by SGI producers was from sales made to SGI residents, it would only satisfy about 21% of the regional spending on food, which represents a real opportunity for local farms to invest in their businesses and expand their production levels.

A total of 78% of the land surveyed during the Agricultural Land Use Inventory was considered to have limited potential for farming or was available with potential for farming. Therefore, there is significant land available for agriculture in the region indicating additional potential for growth. Many of the respondents to the farmer survey indicated that they would expand their operations if they could market additional products for a reasonable return. There were significant concerns with the cost of production and the main challenges facing farmers in the SGI region are: lack of suitable labour, water limitations, lack of processing, regulatory barriers, access to markets, transportation, and environmental impacts (e.g. Canada geese, deer, invasive species, climate change, etc.).

There are many opportunities present to help manage some of the challenges that farmers experience living in remote island communities. There are a variety of Provincial and Federal support programs that can help with marketing initiatives. There are also key producer and processor organizations such as the BC Association of Farmers' Markets, BC Association of Abattoirs, Small Scale Food Processor Association and the Certified Organic Associations of BC than can assist with education, shared costs for insurance, and marketing support.

There are also excellent examples on and off the Southern Gulf Islands of initiatives such as cooperative marketing models, local farm stores, farmer alliances and networks, and Community Supported Agriculture (CSA) programs that could be duplicated in the SGI region.

Introduction

The purpose of this Market Opportunities Analysis (MOA) is to identify economic sustainability opportunities for agriculture in the Southern Gulf Islands (SGI) region. Results from public and stakeholder consultation, as well as research conducted during the development of the Situation Analysis, were used to determine challenges and opportunities for the farm and food community in the SGI. The MOA was developed using the following methodology and engagement approach:

1. Literature review and research on economic development indicators;
2. Responses from two surveys (one for farmers and one for community members);
3. Data gathered during the Agricultural Land Use Inventory;
4. Feedback from the open houses; and
5. A high level calculation of food self-sufficiency currently in the SGI region.

This report is a working document and it is meant to be used in conjunction with the Situation Analysis to provide important direction towards completing the final Strategy. This report can be added to over time to reflect changes that may occur in the island communities and new initiatives and opportunities that arise that contribute to the food self-sufficiency in the SGI.

The MOA is structured using the following subsections:

- Methodology
- Economic Indicators
    - Community overviews
    - Employment Trends in Agriculture
    - Community Support for Agriculture
- Outlook for the SGI Agricultural Sector
    - Current Situation
    - Food Self-Sufficiency Potential
- Global, National and Provincial Market Context
- Capacity for Market Expansion
- Key Issues and Opportunities
- Success Stories
- Summary of Challenges and Opportunities

Methodology

Communications and Engagement Strategy

Early on in the process a Communications and Engagement Strategy was created to support the development of a broadly understood and supported, effective, and implementable Food and Agriculture Strategy (FAS) for the Southern Gulf Islands Electoral Area (SGIEA). Objectives of the engagement strategy were as follows:

- Through the project Manager and the Steering Committee, initiate regular communications between CRD and SGIEDC on the project charter and communications strategy;
- Identify engagement approaches and opportunities on each island to ensure the community, local decision makers and governmental agencies are aware of the project, kept up-to-date, and know how/when they can be involved;
- Increase local awareness of the project on the 5 islands, provide updates on the project and let the islanders know how/when they can be involved in the project; and
- Communicate the highlights of the Food and Agriculture Strategy to the island public and stakeholders and illustrate how input received has been incorporated into the plan.

Opportunities for engagement were identified such as: media releases, community meetings, presentations, website, social media, posters, bulletins, etc. Evaluations mechanisms were also put into place to gauge success and monitor progress.

Regular meetings with the SGI FAS Steering Committee were held to gain feedback on draft reports, Agricultural Land Use Inventory (ALUI) maps, and address any concerns. Key stakeholders from each island were also identified to ensure that the right people were being consulted and represented at meetings.

Open Houses

An open house is an opportunity for a larger group of people to interact and provide feedback in the agricultural planning conversation. The SGI Open Houses consisted of presentations on findings as well as interactive group work to gather information to inform next steps in the development of the FAS. Open houses took place in March 2015 on Pender, Mayne, Saturna and Galiano. As part of the planning process a series of initial Dialogue sessions were held, engaging over 70 residents in a conversation about the desired future for local food and agriculture. These sessions provided an opportunity to gather information from agricultural sector workers and the public through informal small group discussions aiming to answer three questions:

1. What is the state of food and agriculture in the Southern Gulf Islands and on your island?
2. What do we want it to be?
3. What needs to happen to get it there?

The community dialogues took place at the following locations:

Saturday, Mar. 14	Mayne Island - Agricultural Hall - 2-5 pm
Friday, Mar. 20	Galiano Island - Lions Hall - 2-5 pm
Saturday, Mar. 21	Pender Islands – Community Hall - 2-5 pm
Sunday, Mar. 22	Saturna Island - Community Hall – 10 am - 1 pm

Notes and outcomes of the session were provided to the community and posted on the Growing Islands project website at http://growingislands.com/community-dialogues/.

Agricultural Land Use Inventory (ALUI)

Concurrent to the development of this Food and Agriculture Strategy, the BC Ministry of Agriculture (AGRI) conducted an Agricultural Land Use Inventory (ALUI) for the region. The ALUI provides detailed parcel-by-parcel information about land cover, land use, and irrigation practices when observed. The ALUI results can serve as an additional "snapshot" of agriculture in the region and encompassed 711 lots (properties) over 6,891 hectares (ha). The ALUI considered land "Farmed" if:

- Cultivated field crops: vegetation under cultivation for harvest or pasture including land temporarily set aside from farming and perennial crops that were not harvested or grazed in the current growing season
- Farm infrastructure: built structures associated with farming such as barns, stables, corrals, riding rings, and their associated yards
- Greenhouses: permanent enclosed glass or poly structures with or without climate control facilities for growing plants and vegetation under controlled environments
- Crop barns: permanent enclosed structures with non-translucent walls for growing crops such as mushrooms or bean sprouts

Since the ALUI is limited by what can be determined using a windshield survey and orthophotos (aerial photos), some discrepancies are to be expected. Additionally, the ALUI used a geographic range that differed from the Census Consolidated Subdivision provided by Statistics Canada.

Surveys and Interviews

Electronic and hard copy surveys were developed to solicit feedback on current level of support for local food production and potential economic/policy challenges and opportunities. Two survey versions were created to best target the interests of farmers and community members. The hard copy farmer survey was created by the Pender Island Farmers' Institute and distributed by Barbara Grimmer at a variety of local events, through email, hand delivered to individuals and through the Growing Islands website. An electronic survey was developed for the general community through FluidSurveys and disseminated through the Growing Islands website and Facebook. The community survey was open for respondents to submit from August 27, 2015 to October 14th, 2015 and the farmer survey was available throughout the summer and fall of 2015.

The farmer survey received 30 responses and the community survey received 99 responses. Input received was used to develop the list of issues and opportunities for this MOA and to refine the list of key priorities for the Strategy. It is important to note that the survey participants do not represent a random sample due to the fact that they were able to self-select on their choice to fill out the survey (i.e. participation was voluntary). Key findings from the surveys are included in the body of this report.

Literature Review and Secondary Research

In order to gain information on the economic situation and community overview for each island, a number of reports and documents were consulted. These include Statistics Canada Census reports, the Agricultural Census, background documents developed for the Islands Trust, as well as reports published by the Agricultural Land Commission (ALC) and BC Ministry of Agriculture (AGRI) documents. All data sources are listed as footnotes and in the References section.

Economic Indicators

Community Overviews

Located in the protected waters of the Strait of Georgia, the Southern Gulf Islands Electoral Area (SGIEA) is composed of more than seventy islands. The electoral area stretches from Galiano Island to D'Arcy Island, encompassing 216 square kilometres. It includes Galiano, Mayne, North and South Pender, Saturna Islands as well as a number of smaller associated islands.

This unique unincorporated area is under the joint jurisdiction of the CRD and the Islands Trust. The CRD provides many of the local government functions and services normally found within a Municipality or town, while the Island Trust regulates all land use and administers Official Community Plans within the area through the 5 Local Trust Committees (LTC). The Islands Trust and its LTCs are involved in the agricultural planning process.

The population in 2011 was 4,745 in the Capital G region as designated as a Census Consolidated Subdivision (CCS) by Statistics Canada[1].

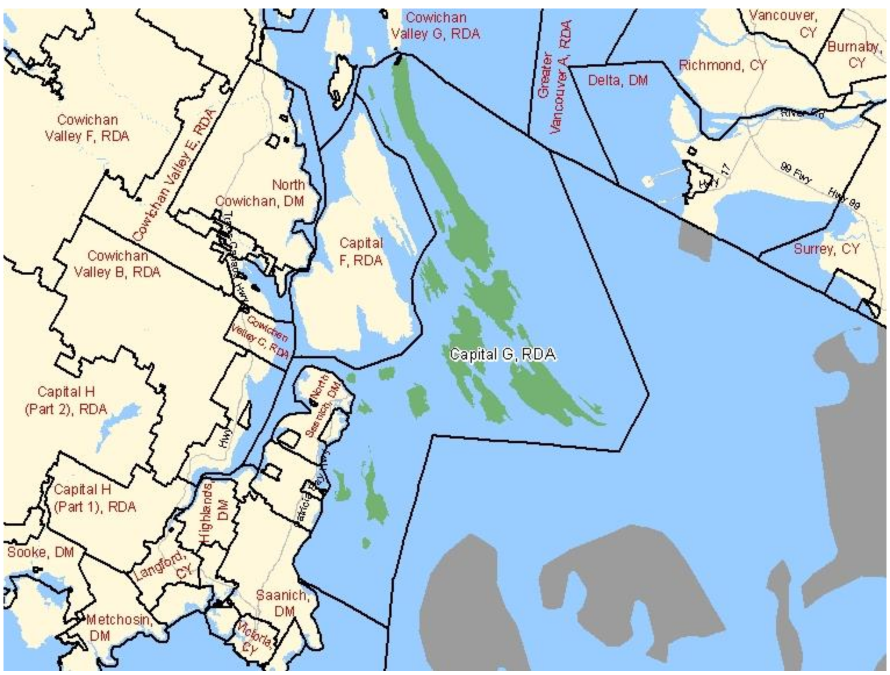

Figure 1. Area of the Capital G CCS Designated by Statistics Canada.

In 2006, the population numbered 5,101, which is a -7.0% change over that period, indicating the population declined in this region during that time. The population density was also 25.5 persons per km^2, compared to 153.8 persons per km^2 in the Capital Regional District. The total number of census families in the region was 1,535, with 81% (1,245) families made up of 2 persons.

[1] 2011 Census Data. Capital G – Southern Gulf Islands. http://www12.statcan.ca/census-recensement/2011/dp-pd/map-carte/index-eng.cfm

Table 1 shows the breakdown of population and employment figures for the Southern Gulf Islands and surrounding areas. The SGI region has a slightly lower percentage of people in the labour force than in other regions, with a comparable unemployment rate to the Capital Regional District. The unemployment rate, however, is lower than the whole of British Columbia.

Table 1. Population Statistics and Unemployment Rate in SGI and BC. Source: Statistics Canada, NHS Data[2].

	Capital G, RDA	Saanich and Gulf Islands	Capital, RD	British Columbia
Total population	4,745	114,345	351,060	4,324,455
Total population over 15 years in the labour force (% of total population)	2,210 (46.6%)	59,825 (52.3%)	197,460 (56.2%)	2,354,245 (54.4%)
Employed	2,075	56,540	185,530	2,171,465
Unemployed	130	3,285	11,935	182,775
Unemployment Rate	5.9%	5.5%	6.0%	7.8%

Population in the Gulf Islands is expected to increase within the next 25 years substantially from 15,454 to 18,420, which is a 19.2% growth. These results are from BC Statistics and incorporate projections for all Gulf Islands in BC.

Table 2. Population Projections for the Gulf Islands. BC Stats.

Year	Population Estimates and Projections[3]
2010	15042
2011	15139
2012	15170
2013	15180
2014	15324
2015	15454
2018	15889
2020	16176
2030	17485
2040	18420

Employment Trends in Agriculture

The most recent labour and employment data available for the Gulf Islands was from 2011. At that time there was a total labour force of 2,210 for Electoral Area G in the CRD. Table 3 demonstrates the number of individuals employed in a variety of occupations. The number of people employed in the natural resources, agriculture and related sector was slightly higher at 2.9% than in the CRD (1.7%) and BC (2.6%). The occupations with the highest level of employment in the SGI region were in the following sectors:

- Sales and service (20.6% of labour force)

[2] National Household Survey Data. Statistics Canada. 2011. http://www12.statcan.gc.ca/nhs-enm/2011/dp-pd/index-eng.cfm

[3] Population Projections – Gulf Islands http://www.bcstats.gov.bc.ca/StatisticsBySubject/Demography/PopulationProjections.aspx

- Management occupations (20.4% of labour force)
- Education, law and social, community and government services (14% of labour force)
- Business, finance and administration (12.4% of labour force)

Table 3. Number of Individuals Employed in Occupations. NHS Data.

	Capital G, RDA	Saanich and Gulf Islands	Capital, RD	British Columbia
Total Number in Occupations[4]	2,210	59,825	194,735	2,305,320
Management occupations	450 (20.4%)	7,170 (12%)	22,080 (11.3%)	263,685 (11.4%)
Business, finance and administration	275 (12.4%)	9,905 (17%)	33,170 (17.0%)	368,980 (16.0%)
Natural and applied sciences and related	135 (6.1%)	5,040 (8%)	15,345 (7.9%)	154,055 (6.7%)
Health	55 (2.5%)	4,530 (8%)	14,490 (7.4%)	147,620 (6.4%)
Education, law and social, community and government services	310 (14.0%)	7,680 (13%)	27,450 (14.1%)	265,910 (11.5%)
Art, culture, recreation and sport	185 (8.4%)	2,350 (4%)	7,525 (3.9%)	78,565 (3.4%)
Sales and service	455 (20.6%)	13,615 (23%)	46,170 (23.7%)	554,345 (24.0%)
Trades, transport, and equipment operators and related	240 (10.9%)	6,635 (11%)	22,330 (11.5%)	337,140 (14.6%)
Natural resources, agriculture and related	65 (2.9%)	1,320 (2%)	3,385 (1.7%)	60,295 (2.6%)
Manufacturing and utilities	25 (1.1%)	845 (1%)	2,785 (1.4%)	74,720 (3.2%)

In comparison, Table 4 shows the number of individuals employed in industries as designated by the North America Industry Classification System (NAICS). It is interesting to note that the number of individuals employed in agriculture, forestry, fishing and hunting is considerably higher by percentage at 6.8% in the Southern Gulf Islands than in the CRD (1.1%) and BC (2.7%). The industries with the highest level of employment in the SGI region were accommodation and food services, construction, and health care and social assistance, which varies somewhat from the figures provided for occupation.

Table 4. Number of Individuals Employed in NAICS Industries. NHS Data.

	Capital G, RDA	Saanich and Gulf Islands	Capital, RD	British Columbia
Total Number in Industries[5]	2,215	59,820	194,735	2,305,315
Agriculture, forestry, fishing and hunting	150 (6.8%)	1,005 (1.7%)	2,120 (1.1%)	61,210 (2.7%)
Mining, quarrying, and oil and gas extraction	0 (0.0%)	115 (0.2%)	415 (0.0%)	25,450 (1.1%)
Utilities	0 (0.0%)	215 (0.4%)	545 (0.0%)	13,215 (0.6%)
Construction	250 (11.3%)	4,270 (7.1%)	14,185 (7.3%)	181,510 (7.9%)
Manufacturing	75 (3.4%)	2,240 (3.7%)	6,450 (3.3%)	148,810 (6.5%)
Wholesale trade	115 (5.2%)	1,725 (2.9%)	4,905 (2.5%)	90,560 (3.9%)
Retail trade	220 (9.9%)	6,845 (11.4%)	22,510 (11.6%)	266,265 (11.6%)
Transportation and warehousing	80 (3.6%)	2,265 (3.8%)	6,900 (3.5%)	118,675 (5.1%)
Information and cultural industries	25 (1.1%)	1,030 (1.7%)	3,750 (1.9%)	62,235 (2.7%)
Finance and insurance	25 (1.1%)	1,870 (3.1%)	6,215 (3.2%)	91,790 (4.0%)

[4] 2011 National Household Survey occupation data is produced using the National Occupational Classification (NOC)
[5] 2011 National Household Survey Industry data is produced according to the North American Industry Classification System (NAICS) 2007.

Real estate and rental and leasing	80 (3.6%)	1,265 (2.1%)	4,495 (2.3%)	54,840 (2.4%)
Professional, scientific and technical services	130 (5.9%)	5,305 (8.9%)	16,025 (8.2%)	179,355 (7.8%)
Management of companies and enterprises	0 (0.0%)	25 (0.0%)	150 (0.0%)	2,440 (0.0%)
Administrative and support, waste mgmt and rem. Services	150 (6.8%)	2,535 (4.2%)	8,060 (4.1%)	98,890 (4.3%)
Educational services	135 (6.1%)	4,850 (8.1%)	15,750 (8.1%)	167,875 (7.3%)
Health care and social assistance	225 (10.2%)	7,845 (13.1%)	26,020 (13.4%)	249,030 (10.8%)
Arts, entertainment and recreation	100 (4.5%)	1,680 (2.8%)	5,220 (2.7%)	56,915 (2.5%)
Accommodation and food services	300 (13.5%)	4,600 (7.7%)	15,965 (8.2%)	179,625 (7.8%)
Other services (except public administration)	60 (2.7%)	2,355 (3.9%)	8,210 (4.2%)	112,745 (4.9%)
Public administration	80 (3.6%)	7,045 (11.8%)	26,850 (13.8%)	143,875 (6.2%)

Table 5 shows the breakdown in income for individuals in the study area and surrounding regions. The average and median income were slightly lower than for other areas in the Province and the number of individuals making less than $60,000 per year was higher than in other areas as well.

Table 5. Individual Income Per Year for SGI and Surrounding Regions. NHS Data.

	Capital G, RDA	**Saanich and Gulf Islands**	**Capital, RD**	**British Columbia**
Number of individuals with income[6]	4,405	96,395	293,605	3,464,260
Median income ($)	26,200	32,862	32,983	28,765
Average income ($)	34,746	43,237	41,653	39,415
Under $5,000	315 (7.2%)	9,095 (9.4%)	25,940 (8.8%)	401,210 (11.6%)
$5,000 to $9,999	280 (6.4%)	5,850 (6.1%)	18,295 (6.2%)	244,705 (7.1%)
$10,000 to $14,999	565 (12.8%)	8,140 (8.4%)	25,650 (8.7%)	333,325 (9.6%)
$15,000 to $19,999	500 (11.4%)	8,425 (8.7%)	25,945 (8.8%)	332,735 (9.6%)
$20,000 to $29,999	820 (18.6%)	12,955 (13.4%)	39,460 (13.4%)	470,255 (13.6%)
$30,000 to $39,999	425 (9.6%)	11,550 (12.0%)	36,585 (12.5%)	404,860 (11.7%)
$40,000 to $49,999	455 (10.3%)	10,250 (10.6%)	33,230 (11.3%)	338,595 (9.8%)
$50,000 to $59,999	405 (9.2%)	7,860 (8.2%)	25,045 (8.5%)	253,215 (7.3%)
$60,000 to $79,999	305 (6.9%)	11,075 (11.5%)	32,300 (11.0%)	330,590 (9.5%)
$80,000 to $99,999	160 (3.6%)	5,310 (5.5%)	15,780 (5.4%)	169,190 (4.9%)
$100,000 and over	160 (3.6%)	5,895 (6.1%)	15,370 (5.2%)	185,580 (5.4%)
$100,000 to $124,999	80 (1.8%)	2,860 (3.0%)	7,490 (2.6%)	89,520 (2.6%)
$125,000 and over	75 (1.7%)	3,035 (3.1%)	7,880 (2.7%)	96,055 (2.8%)

The number of farmers in the SGI region in 2011 was 130, down from 135 in 2006, which is approximately 2.6% of the population[7]. The number of farmers living on the farm also decreased from 93% in 2006 to

[6] Total income refers to monetary receipts from certain sources, before income taxes and deductions. It includes employment income from wages, salaries, tips, commissions and net income from self-employment; income from government sources, such as social assistance, child benefits, employment insurance, old age security pension, Canada or Quebec pension plan benefits and disability income; income from employer and personal pension sources; income from investment sources; and other regular cash income, such as child support payments, spousal support payments (alimony) and scholarships.

[7] Statistics Canada Data. Census of Agriculture. 2011.

85% in 2011. Additionally, more operators were on farms with two or more operators in 2011 than in 2006.

The average age of operators was 59.5 years, which is higher than the BC average of 55.7 years. The age of operators increased from 2006 to 2011, as did the number of operators in the 55 years and over category. Less than 4% of the farmers in the SGI region are under the age of 35, which is lower than the overall percentage in BC, the Lower Mainland, and Canada. The number of operators over the age of 55 has increased in the region to nearly 73%, which is higher than the BC average (54%). More information regarding business relationships and hours spent working on the farm can be found in the Situation Analysis.

Overall, in the SGI farms became less profitable from 2006 to 2011. The gross margin decreased from -6.31% in 2006 to -15.12% in 2011, meaning that for every dollar of sales, the farmer is losing 15.12 cents. The BC gross margin average is 11.3%, so the SGI falls far below the average range for profitability. As expected, gross farm receipts have risen since 2006, but so have operating expenses.

Table 6. Farm profitability from 2006 to 2011. Statistics Canada.

Gross Farm Receipts ($)		Total Operating Expenses ($)		Gross Margin (%)	
2006	2011	2006	2011	2006	20011
1,095,361	2,071,207	1,164,515	2,384,468	-6.31%	-15.12%

The revenue per hectare increased from $376.67 in 2006 to $925.47 in 2011, which is encouraging, but, as mentioned above, these figures do not take operating expenses into account.

Perhaps not surprisingly then, 60% of farms were earning less than $10,000 in gross farm receipts in 2011. Less than half of the farms are making over $10,000 and only 9% are making more than $50,000 per year.

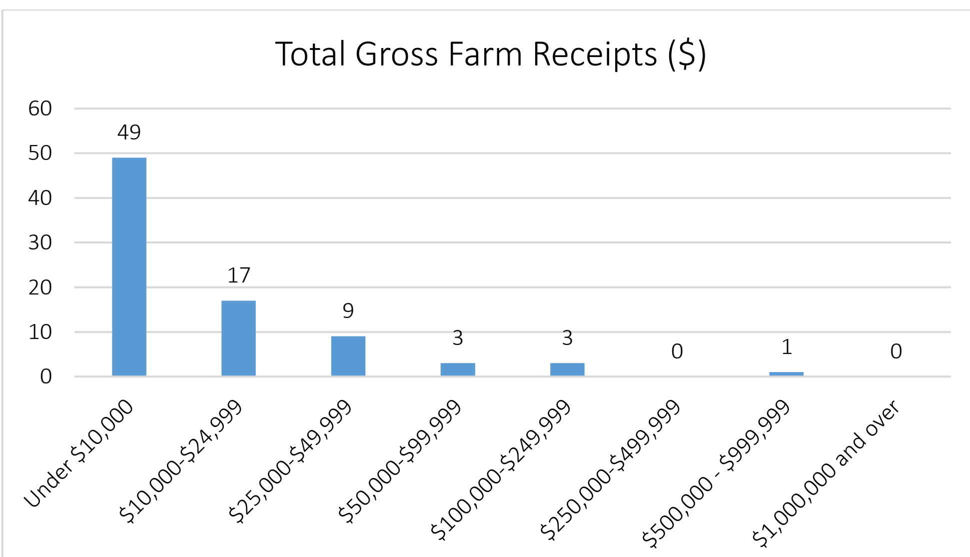

Figure 2. Total Gross Farm Receipts in 2011. Statistics Canada.

Community Support for Agriculture

An online survey was created in the fall of 2015 to illicit responses regarding food and agriculture in the SGI region from the general community. A total of 99 people responded to the survey, which is a 2.1% response rate.

A total of 40.2% of the respondents indicated that previous generations of their families were farmers, while 42.4% of the respondents have no family history of farming. Yet, 86.5% of the respondents indicated that they personally knew farmers in the Southern Gulf Islands and 52.6% mentioned they had average knowledge about food and farming in the region.

When survey respondents were asked whether they were familiar with consumer awareness and marketing initiatives that encourage support for local food production, 92.8% said yes. Most were familiar with the 100 Mile Diet, Buy Local BC and Farmers' Markets. Other initiatives mentioned included: roadside stands, Young Agrarians, the Slow Food Movement, Grow Your Own, FarmFolk/CityFolk, the Certified Organic Associations of BC (COABC), Island Sustainability, permaculture and biodynamic farming.

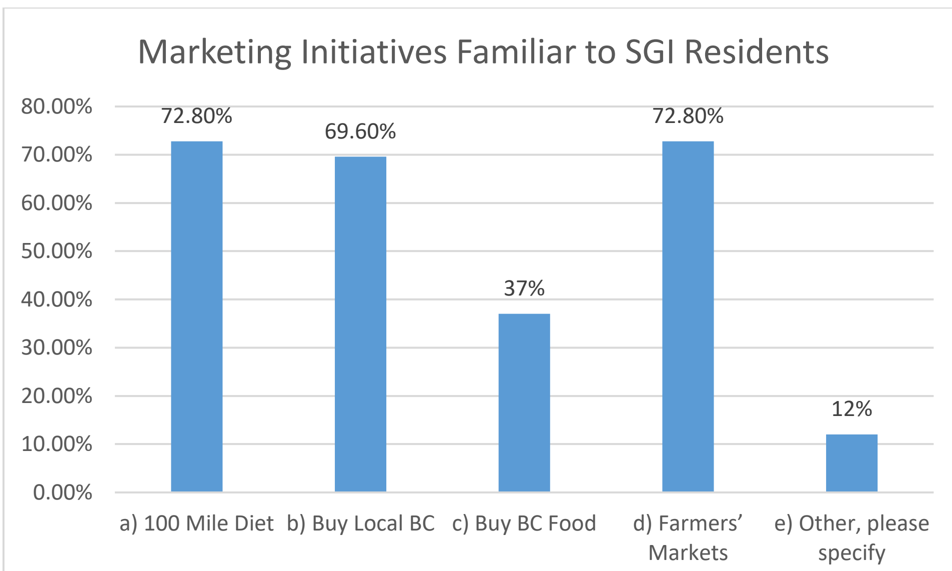

Figure 3. Consumer Awareness and Marketing Initiatives Familiar to SGI residents.

A total of 78.9% of the respondents have their own food garden, while only 14.6% raise animals for personal consumption. While many residents are growing their own food, they are still demonstrating support for farmers and food producers on the islands. When asked whether respondents support 'buying local' by purchasing items grown on the SGI at farmers' markets, grocery stores, and restaurants/cafes, 47.9% say they always support and 49% said they sometimes support.

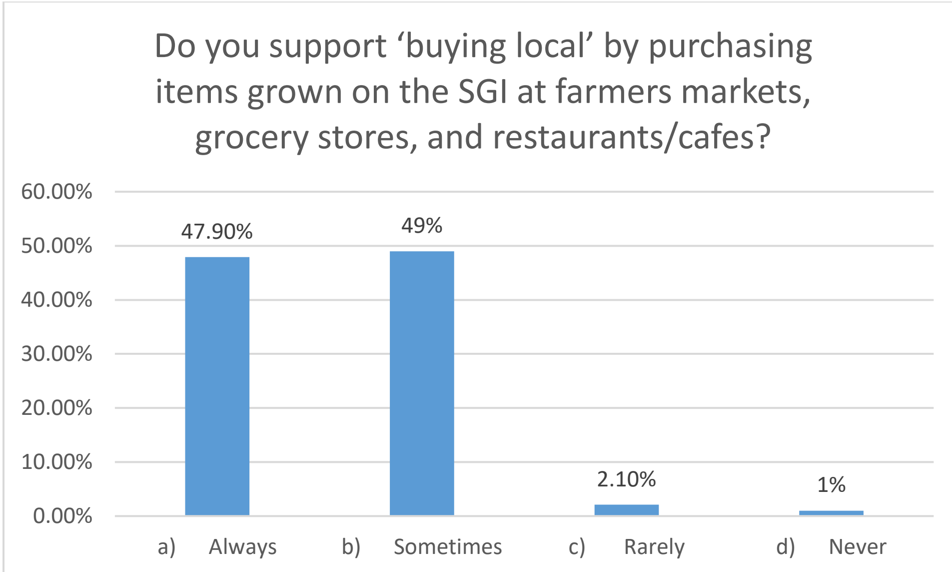

Figure 4. Support for Buying Local in the SGI Region

When asked what value-added farm products respondents purchase when they do purchase local products, the top responses were baked goods, meat products, canned preserves or pickles, and soap and/or bath and beauty products.

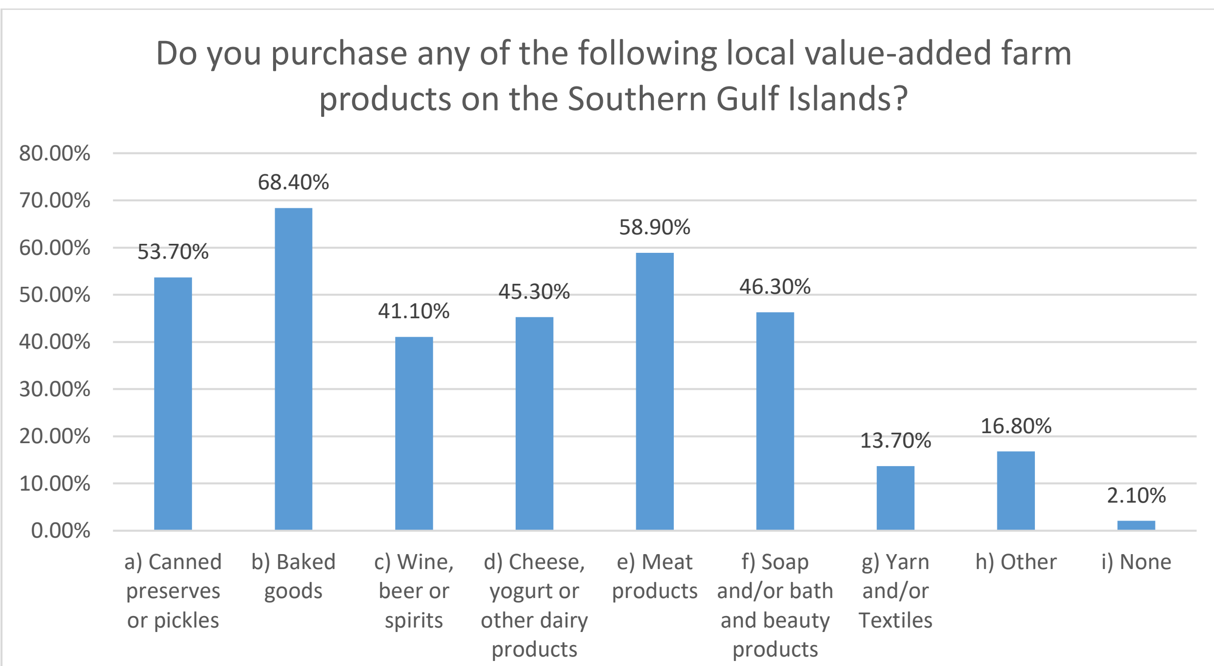

Figure 5. Value-Added Products Purchased in the SGI Region.

SGI residents are purchasing approximately 30% of their products at supermarkets off the islands, but they still aim to purchase from local grocers and food stores and support local farmers at farmers' markets or at farm gates where possible. While 11.5% of respondents purchased their food directly from farms or at farm gates, only 1.5% purchased food through Community Supported Agriculture (CSA) (weekly box) programs, which indicates either a lack of availability of these programs, or a low desire to source food products through this manner. This is something that should be explored in more depth as it could indicate a potential market opportunity for farmers in the SGI region.

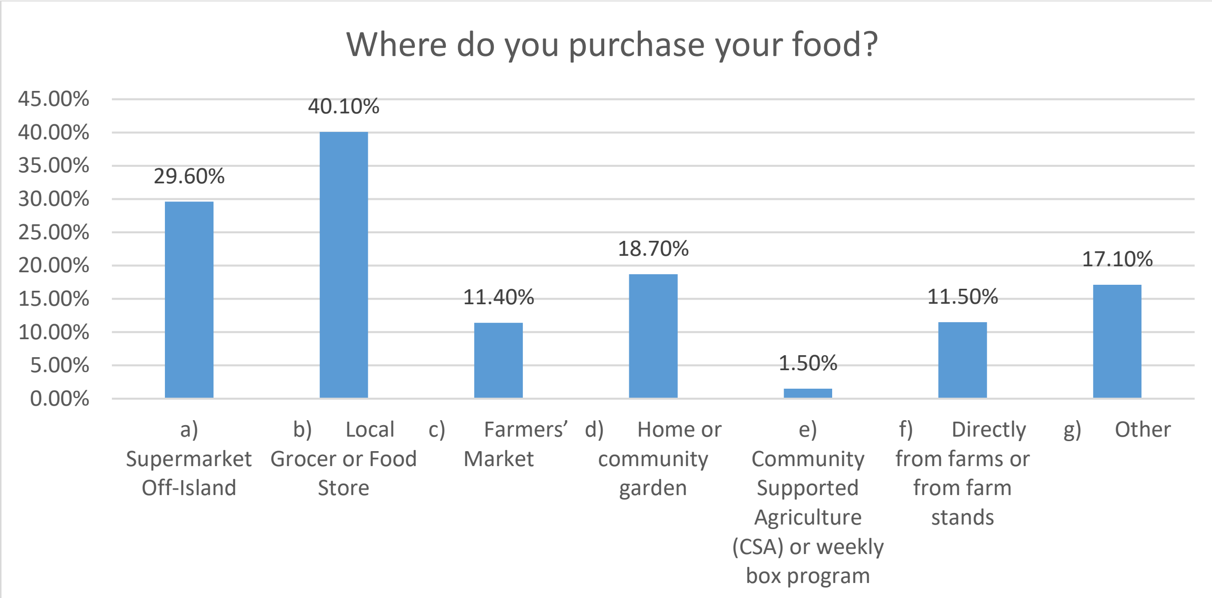

Figure 6. Where Food Is Purchased by SGI Residents.

When respondents were asked what factors were most important when purchasing food there were a number of things that were identified. Of the most important factors freshness/quality, nutritional content, and locally grown or produced were the top responses. Respondents also suggested that seasonality, price, convenient store location and organic status were usually important. This indicates further support for local farmers as residents seem to choose locally grown or produced products before some other factors.

Table 7. Factors that Are Considered Important when Purchasing Food in the SGI.

	Very Important		Usually Important		Rarely Important		Not Important	
	Count	%	Count	%	Count	%	Count	%
a) Price	26	26.80%	57	58.80%	12	12.40%	2	2.10%
b) Locally grown or produced	56	57.70%	37	38.10%	3	3.10%	1	1%
c) Organic	27	27.80%	45	46.40%	19	19.60%	6	6.20%
d) Nutritional content	59	60.80%	36	37.10%	1	1%	1	1%
e) Brand name	3	3.10%	14	14.40%	40	41.20%	40	41.20%
f) Seasonality	27	27.80%	69	71.10%	1	1%	0	0%
g) Freshness/quality	80	82.50%	16	16.50%	1	1%	0	0%
h) Convenience/preparation time	2	2.10%	23	24.20%	60	63.20%	10	10.50%
i) Convenient store location	7	7.20%	55	56.70%	26	26.80%	9	9.30%
j) Fair trade	28	29.50%	35	36.80%	29	30.50%	3	3.20%
k) Other	6	18.80%	6	18.80%	3	9.40%	17	53.10%

A total of 49.5% of respondents also indicated that they spend approximately $400 to $600 per month per household for groceries and 35.4% of this is spent on local food. Respondents also indicated that they typically spend 10-25% of their total household budget on food.

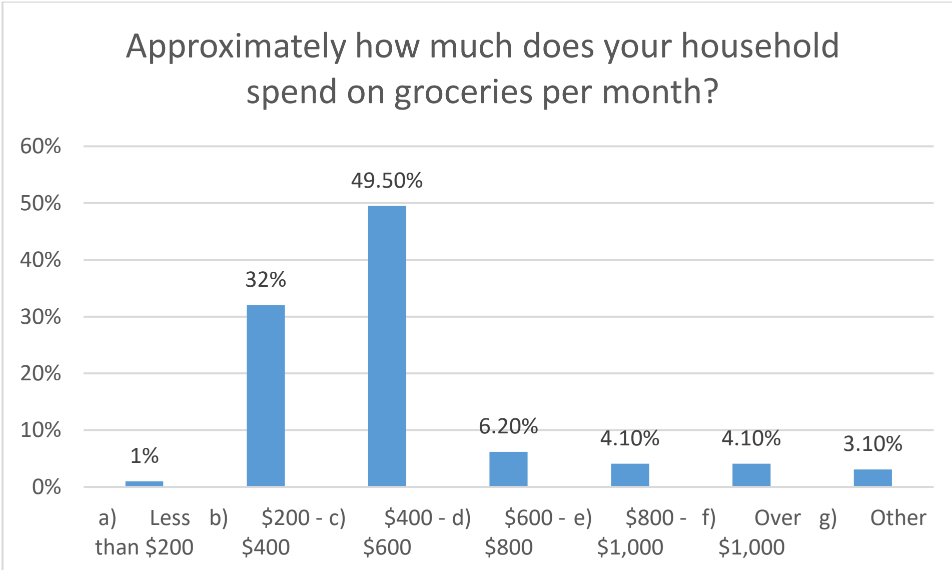

Figure 7. Amount Spent on Groceries per Month by SGI Residents.

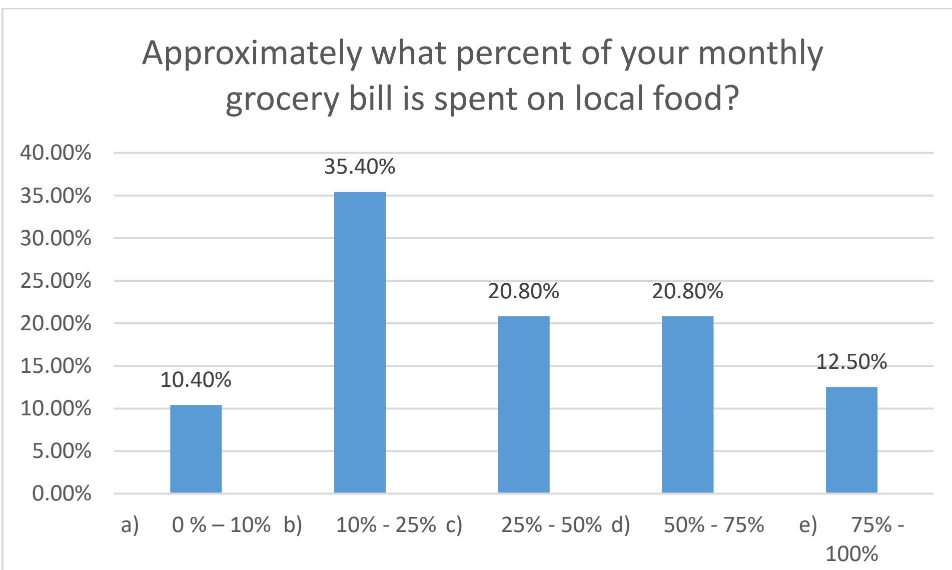

Figure 8. Percentage of Monthly Grocery Budget Spent on Local Food by SGI Residents.

When asked if respondents would be willing to pay a higher price for local food in order to support local farmers, the majority (65.7%) indicated that they would be willing to pay 10% - 50% more than the price of imported foods, which is a clear indication of the support for local food in the SGI region.

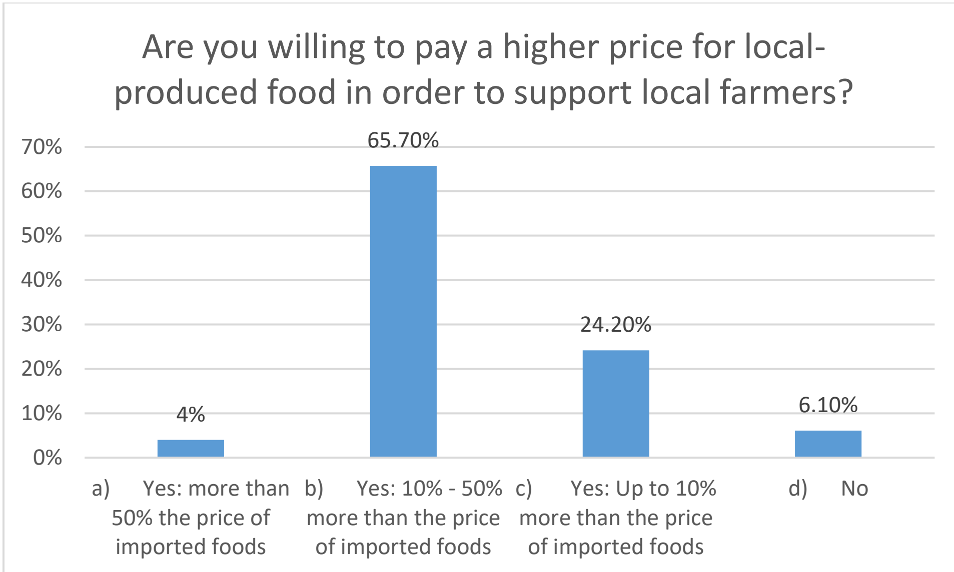

Figure 9. Willingness to Pay a Higher Price for Local Food by SGI Residents.

Overall, consumers in the Southern Gulf Islands are very supportive of agriculture and local farmers. However, they would like to see some additional products grown on the islands that they have trouble accessing currently. The top products they would like to see grown or produced included nuts, berries, tree fruits, and flour/grains.

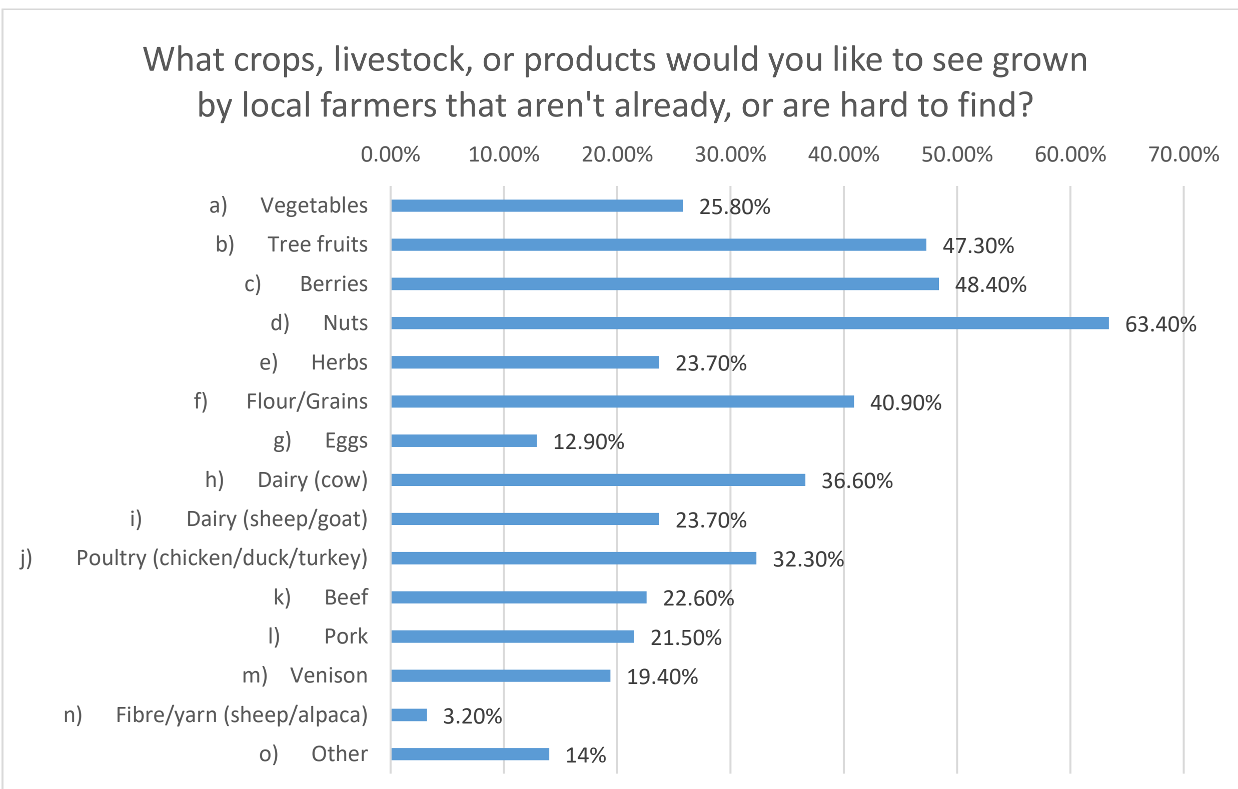

Figure 10. Products Consumers Would like to See Grown in the SGI Region.

Outlook for the SGI Agricultural Sector

Current Situation

In order to analyze the current situation of agriculture in the SGI region, the land available for farming, current farming initiatives and practices, and food self-sufficiency potential were examined. A combination of the Agricultural Land Use Inventory (ALUI), farmer survey data and high level calculations were used to develop a snapshot of farming in the SGI area.

Land Available for Farming

The total area of land in the Southern Gulf Islands region is 54,844 hectares (only 19,122 ha is on land), with 2,347 ha (12%) in the Agricultural Land Reserve. There are 16,399 ha of land within the ALR in the Capital Regional District, 14% of which is on the Southern Gulf Islands. There are an additional 17 ha of ALR land on Saturna Island Indian Reserve, which is not included in the total.

The total area of crop production identified during the Agricultural Land Use Inventory was 661 ha (541 ha within the ALR and 121 ha outside of the ALR). The total area farmed in the Southern Gulf Island (SGI) region, both actively and inactively, takes up 25% of the total area of the ALR in the SGI, indicating there is much room for growth.

Table 8 describes land use identified during the Agricultural Land Use Inventory (ALUI). Land cover describes the biophysical material at the surface of the earth and is distinct from land use, which describes how people utilize the land[8]. Land cover was used to determine whether a parcel of land was "farmed" or "supported farming". Land cover types that were considered "farmed" included:

- **Cultivated field crops** – vegetation under cultivation for harvest or pasture, including land temporarily set aside from farming and perennial crops not harvested or grazed in current growing season
- **Farm infrastructure** – built structures associated with farming such as barns, stables, corrals, riding rings, and associated yards
- **Greenhouses** – permanent enclosed glass or poly structures with or without climate control facilities for growing plants and vegetation under controlled environments
- **Crop barn** – permanent enclosed structures with non-translucent walls for growing crops such as mushrooms or bean sprouts

Land cover types that were considered to "support farming" included farm residences, vegetative buffers, artificial water bodies, and farm road access.

Properties that were denoted as currently "used for farming" or with some agriculture present were considered available for farm expansion. Properties denoted as "not used for farming", but with an existing use compatible with agriculture (such as residential) were considered "available for farming". Properties that were denoted as "not used for farming" and with an established non-farm use incompatible with agriculture (e.g. golf course, school, small lot residential) were considered "unavailable for farming". These properties were generally too small for agriculture, very high land values, or uneconomical for a farmer to acquire and convert to farmland due to limited farming potential.

[8] ALUI Report

Additionally, parcels with biophysical constraints such as slope, soil limitations, and water bodies that took up the entire parcel were also considered to be unavailable for agriculture.

Parcels classified as "limited potential for farming" had site limitations such as soils, topography, flooding, drainage, operational constraints, and significant riparian areas. Parcels denoted as "available with potential for farming" were mainly natural or semi-natural areas, managed vegetation, unmaintained field crops, natural pasture or rangeland, unused forage or pasture, and/or non-built or bare anthropogenic areas.

Table 8. Land available and with potential for farming in the Southern Gulf Islands, ALUI.

	In the ALR	Outside the ALR	Total
Actively farmed	551	129	680 (10%)
Supporting farming	12	8	20 (<1%)
Unavailable for farming	143	586	729 (11%)
Limited potential for farming	1011	2775	3786 (57%)
Available with potential	576	810	1,386 (21%)
Total	2293	4308	6601 (100%)

A total of 78% of the land surveyed during the ALUI was considered to have limited potential for farming or was available with potential for farming. Therefore, there is significant land available for agriculture in the region indicating the potential for growth in this sector.

Current Farming Initiatives and Practices

During the summer of 2015, the Pender Islands Farmers' Institute developed a survey[9] geared towards farmers to help the Institute plan for their future and provide some input into the SGI Food and Agriculture Strategy. A total of 30 surveys were returned via hard copy with the following distribution:

- 63% from North Pender
- 18% from South Pender
- 14% from Mayne
- 5% from Galiano

Attempts were made to obtain completed surveys from Saturna, but this was not possible given the time constraints and time of year.

The main issues identified by the survey as challenges to farming and food production in the SGI region were: lack of suitable labour, water limitations, lack of processing, regulatory barriers, access to markets, transportation, and environmental impacts (e.g. Canada geese, deer, invasive species, climate change, etc.). Farmers expressed the reasons they continued to farm as: a love of what they are doing, a love of the land, and the feeling that they are doing the right thing.

The total amount of land reported as farmed in this survey was 641 acres (380 in the ALR, 240 zoned Rural, 21.25 zoned Rural Residential), which is less land that was denoted as farmed in the ALUI, indicating that many farmers may not have responded to the survey. A total of 24% of respondents noted that they

[9] Pender Island Farmers' Institute survey of farmers and food producers from the Southern Gulf Islands. Johnstone, B. (2015)

wished to lease more land and 19% wanted to lease some of their land to other farmers as part of a succession plan.

Only 57% of the respondents produce farm products for sale, which means that a large percentage of the farmers in the SGI region are producing products for subsistence use only or they have leased their land to another farmer.

Most of the farmers in the SGI region are committed to using natural farming methods. A total of 81% of the respondents said they use organic practices, but are not certified, 28% use natural practices and 4% are certified organic by the Islands Organic Producers Association (IOPA). Farmers are generally talking with one another to seek help with farming practices, but there is interest in establishing a loaning library, local seminars and discussions, a network of farmers, and distance education options that can be attended while working full time. Some of the topics recommended were cheese making, greenhouse production, and organic production.

The challenges to farming within the island communities are significant. A total of 57% of the respondents identified the supply of adequate farm labour as an issue. Family members are the main workforce and few are paid. There was an interest in utilizing the World Wide Opportunities on Organic Farms (WWOOF) program, but some have expressed a need for farm worker housing.

A sustainable water supply was also a concern for many farmers and some were keen to learn more about water storage options, improving irrigation, and ways to mitigate the impacts of climate change in the future. Additionally, other environmental concerns such as nuisance wildlife and invasive species were a significant concern.

Another important concern was raised around the lack of processing facilities for farm products. A total of 43% of farms were processing some or all of their products, while 33% of farmers were currently not processing and would like to be able to. Processing of meat products (lamb, beef, poultry), preserves (jam, jellies, vinegar), fibres (wool, hides) and apples is already occurring in places such as Metchosin, Saanich, Salt Spring, Saturna, Alberta, Ontario, on farms and in certified kitchens where possible. Processing options for meat products and tree fruits were identified as needs on some of the islands.

Ferry transportation on and off the islands is also a significant barrier to economic sustainability for SGI farmers. The biggest concern was with the cost of travel, while others also mentioned the time and complexity involved with moving products on and off the island.

Finally, marketing of farm products was considered a challenge for 48% of the respondents to the survey. Currently, farmers are using the following marketing methods to sell farm products:

- 67% - farm stand
- 29% - farmers market
- 15% - wholesale on-island
- 15% - website sales
- 10% - wholesale off-island (other Gulf Islands, Vancouver Island and Lower Mainland)
- 10% - grocery stores
- 10% - special events
- 10% - social media
- 5% - CSA

Many of the respondents indicated that they would expand their operations if they could market additional products for a reasonable return. There were concerns with the cost of production, but opportunities such as co-operative marketing, farm stores like the one on Mayne Island, and marketing education were suggested.

Food Self-Sufficiency Potential

The current population of the SGI region is approximately 4,745 and is expected to grow along with the rest of the Gulf Islands. In order to measure food self-sufficiency, the BC Ministry of Agriculture developed a Food Self-Reliance model, which estimates that 0.524 ha of land (irrigated and non-irrigated) is required to produce an adequate and healthy diet for one person to live for one year[10].

Using the indicators above, in order to be self-sufficient with the current population in the region, a total of 2,486 ha of land would need to be under cultivation and irrigated. By comparison, the ALUI found that only 75 ha were reported being irrigated in the SGI region, which is only 10% of the cultivated land. This corresponds to only 3% self-sufficiency, indicating copious room for the agricultural sector to expand in terms of production to meet local food needs. This figure is likely a gross overestimate due to the fact that some of the food being produced is shipped out of the region. Therefore, we can assume that actual regional food self-sufficiency is below 3%.

Market Potential

In 2006, the average household (2.4 persons) in BC consumed $8,000 in food per year, or $3,333 per person per household[11]. The most recent Statistics Canada data indicates that the majority of households in the SGI region are made up of 2 person households, therefore the estimated annual household spending on food is $6,666. There are 1,535 households being occupied in the SGI region, suggesting that over $10.2 million is spent annually on food on the islands and in surrounding areas. The total farm gate receipts for the region in 2011 was $2.1 million. Therefore, if all the income made by SGI producers was from sales made to SGI residents, it would still only satisfy about 21% of the regional spending on food. Given the diversity of food being produced in the region this represents a real opportunity for local farms to invest in their businesses and expand their production levels.

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[10] BC's Food Self Reliance Report. BC Ministry of Agriculture, 2006.

[11] Vancouver Island Coast Regional Agriculture Framework for Action. Harasymchuk and Rolston, 2012. http://www.firb.gov.bc.ca/documentation/supervisory_reviews/f_vi_coast_agriculture_framework_2012.pdf

Provincial and Federal Marketing Initiatives and Programs

Provincial Marketing Boards and Quotas

There are currently eight Boards and Commissions in place in BC that manage quota and/or marketing for a variety of products in BC. These are:

- 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

Marketing boards generally control shipments, distribution, and advertising so that producers (over a certain threshold) are unable to sell their products at the farm gate or directly to retailers[12]. A producer must generally leave the system in order for another one to enter it. The system does require someone with the ability to navigate the licencing process and to keep up with ongoing paperwork as required. This creates efficiencies and benefits for those holding quota: it ensures a level marketing playing field, fair prices for products, and streamlined processing systems. On the other hand, it can also create challenges for producers who wish to enter the industry and/or who wish to market or sell their goods directly to retailers and restaurants.

Provincial Marketing Support Programs

Investment Agriculture Foundation of BC (IAF)

The Investment Agriculture Foundation (IAF) strategically invests federal and provincial funds to support innovative projects that benefit the agri-food industry in BC. IAF offers a wide range of funding for industry groups and municipalities in funding categories such as animal industries, plant industries, processing industries, environmental issues, emerging sectors and other. Start-up funding is not available for individuals, but specific funding programs are available within each category to deal with specific industry issues and enhance the sectors. Recent funding includes Buy Local programs, First Nations food branding, pollinator preservation projects, and more.

The IAF's *Food and Beverage Processing Initiative* can be used to address the key issue of inadequate processing infrastructure. Funding is available for projects that match one or more of these strategic priorities:

- Enhance the competitive position of BC food and beverage processors;
- Build BC's reputation as a leader in health and lifestyle-oriented products;
- Build business relationships and collaboration with value chain partners; and

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[12] BC Ministry of Agriculture, Fisheries, and Food. 2003. An Overview of the BC Field Vegetable Industry. Industry Competitiveness Branch. http://www.agf.gov.bc.ca/fieldvegetable/publications/documents/field_veg_profile.pdf

- Enhance communications and coordination among industry stakeholders.

Another funding program that could be beneficial is the *Emerging Sectors Initiative*. IAF classifies an emerging sector as those that have emerging business opportunities; leadership, vision and capacity to increase sectoral contributions to the provincial economy and provincial five-year annual average market receipts of less than $10 million. Examples of emerging sectors include: small scale/lot agriculture, natural health products, aboriginal agriculture, agritourism and direct farm marketing, apiculture, small-scale food processing and more. Projects that address gaps in scientific knowledge, technology adaptation and transfer, skills, business development, collaboration with partners and pre-commercialization exploration may be eligible.

Additionally, IAF also offers Small Project grants for projects under $30,000 where IAF offers up to $10,000 of funding. Projects must be completed within one year and funding is not intended for sub-components of larger projects. Projects are funded based on eligibility, benefit to BC agriculture, demonstrated need, and industry support. There are no set intake deadlines and you can submit an application at any time.

Information on each of these initiatives can be found on the IAF website at
http://www.iafbc.ca/funding_available.

Ministry of Agriculture - Growing Forward 2

The Growing Forward 2 (GF2) is a five-year Agricultural Policy Framework, under Agriculture and Agri-Food Canada (AAFC). It is a $3 billion dollar investment by federal, provincial and territorial governments to increase the profitability of the agricultural sector in Canada. The focus is on innovation, competitiveness and market development to ensure Canadian producers and processors have the tools and resources they need to continue to innovate and capitalize on emerging market opportunities. Programs cover the following key areas:

- Business Risk Management
- Innovation
- Competitiveness and Market Development
- Adaptability and Industry Capacity

Within these categories there are a number of programs relevant to SGI farmers and agricultural organizations. A few key programs include:

- Business Risk Management (Production and Livestock Price Insurance; Crop Loss and Damage Due to Wildlife; and Agriculture Income Protection)
- Canada-BC Agri-Innovation Program
- Climate Adaptation – Regional Agricultural Adaptation and On-Farm Adaptation
- On-Farm and Post-Farm Food Safety Program
- Business Knowledge and Strategic Adaptation (Farm Business Management and Advisory Services)
- Environmental Farm Plan (EFP) Program
- Beneficial Management Plan (BMP) Program
- Environmental Health and Programs (EHAP)
- Environmental Emergencies Planning Program
- Farm Business Advisory Services Program (Provides funding for business consultation services, including farm self-assessments and action plans)

For more information: https://www.ardcorp.ca/ardcorp

AgriMarketing Program (AMP) – Small to Medium Size Enterprises (SME)

The AgriMarketing Program helps farmers and food processors compete in markets at home and abroad. Projects under the following four streams are supported:

1. **Market Development** – builds and promotes Canada's ability to expand markets at home and abroad. Funding is offered to small and medium-sized enterprises (SME) to undertake promotional and market development activities in markets other than Canada. Funding is also available for non-profit organizations.
2. **Assurance Systems** – helps enhance the competitiveness of the agricultural industry by meeting buyer and market demands for assurance.
3. **Breaking down trade barriers**
4. **Building market success**

More information on these programs can be found at: www.agr.gc.ca/agrimarketing

Market Intelligence and Advisory Services Program

Provides businesses and organizations with current and timely market information to support business development in domestic and international markets. Advisory services are available to provide marketing training to develop skills for marketing products in the province or in international markets.

In order to be eligible for the program, applications must be from one or more of the following groups:

- Agrifoods sector producer or processor
- Industry association/organization
- Non-timber forest resource harvester and wildcrafter
- Exporter
- Seafood association and invididividual seafood processor

For more information visit: http://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/programs/growing-forward-2/market-intelligence-advisory-services

Ministry of Agriculture Marketing & Export Workshops and Seminars

Domestic Marketing and Export Marketing Workshops, and Export Opportunity Seminars are available to eligible applicants in several regions.

- One-day domestic marketing workshops on developing your marketing plan and how to sell to major food retailers and food service distributors
- One-day export marketing workshops on trade terminology, principles of international marketing, global supply chain management, and international marketing plan development
- One-day export opportunity seminars on purchasing criteria, regulations and shipping requirements in specific export markets

More information and workshop resources can be found at:

http://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/programs/market-development-and-trade/workshops-and-seminars

Federal Marketing Support Programs

AgriMarketing Program

The AgriMarketing Program helps farmers and food processors compete in markets at home and abroad. It supports the agriculture industry by creating and maintaining access to markets and taking advantage of market opportunities. $341 million is available in the form of government projects and contribution funding during five years (2013-2018).

The department helps the agriculture industry expand markets and seize opportunities through government projects and contribution funding. We support projects under the following four streams:

- Market development stream: builds and promotes Canada's ability to expand markets at home and abroad. Promotional activities help position and differentiate Canadian products and producers, and ensure they meet market requirements.
- Assurance systems stream: helps enhance the competitiveness of the agriculture industry by meeting buyer and market demands for assurance. The stream supports developing national assurance systems or standards for food safety, animal and plant health, market attribute/quality and traceability.
- Breaking down trade barriers
- Building market success

More information can be found at: http://www.agr.gc.ca/eng/?id=1357941192614

Advance Payments Program (APP)

The Advance Payments Program (AAP) is a federal loan guarantee program which provides agricultural producers with easy access to low-interest cash advances. Producers can access up to $400,000 per program year in advances based on the value of agricultural product. The Government of Canada pays the interest on the first $100,000 advanced to a producer. Advances are to be repaid as the producers sells their product and they have up to 18 months to fully repay the advance (24 months for cattle and bison).

As a producer, an APP advance can help you to meet your financial needs, such as farm input costs, immediate financial obligations, and product marketing costs. It can also allow you to make the decision to sell your agricultural products based on market conditions rather than the need for cash flow.
APP advances are available through more than 40 participating Producer Organizations, that is, APP Administrators, across Canada. For more information visit: www.agr.gc.ca/app

Other Marketing and Processing Support Programs

BC Association of Farmers Markets

The BC Association of Farmers Markets (BCAFM) is an umbrella organization for farmers' markets throughout the province. They are committed to developing and strengthening the capacity of farmers' markets in all regions of BC and the key areas of focus are[13]:

- Providing education and training to market boards, managers, and vendors;
- Helping promote farmers' markets to the public and key industry stakeholders;
- Educating the public to choose healthy BC grown agricultural products to ensure a secure food system, to reduce the carbon footprint and to ensure the viability of farming in the future;
- Initiating and managing research and development activities; and
- Delivering a unified industry voice for all BC farmers' markets.

BC farmers' markets can become members of the BCAFM and receive the following member benefits:

- Online promotion of your farmers' market;
- Brochure listing in the BC Farmers' Market directory;
- Access to special pricing on workshops, webinars, conference, and liability insurance;
- Access to special programs such as the Nutrition Coupon Program;
- Use of farmers' market signs on highways;
- Farmers' Market newsletter;
- Support through the BCAFM listserve; and
- A right to vote for BCAFM Executive and Directors.

BC Association of Abattoirs

The BC Association of Abattoirs was founded in 2009 to address the challenges and build on opportunities facing provincially licenses processors and producers to provide consumers with safe, high quality meat and poultry products for commercial markets in BC[14].

The BC Association of Abattoirs run a variety of programs to provide assistance to their members such as:

- 100% BC Beef
- Premium BC Lamb
- BC Meats Quality Information System
- BC BeefNET
- BC Meats Phone App
- BC Food Safety Enhancement Program
- BC's Best Raw Pet Food

The 100% BC Beef brand was developed by the BC Breeders and Feeders Association and the BC Association of Abattoirs. This is a licensing program that provides auditing of BC beef producers for traceability, quality assurance, and animal care. The Premium BC Lamb program is a similar certification

[13] http://www.bcfarmersmarket.org/
[14] http://bcabattoirs.org/

program for lamb producers. Both programs have developed production standards for producers and processors.

Small Scale Food Processor Association

The Small Scale Food Processor Association (SSFPA) is a member organization consisting of small scale processors and supporters that provide leadership, education, marketing, networking and advocacy for BC processors[15]. The SSFPA offers workshops and courses, a specialty food directory, networking opportunities, discount shipping rates with Canada Post, group rates for liability insurance, group rates for social media and website design, and other benefits to their members.

The SSFPA also provides support on food safety concerns through their Food Safety Portal. Some of the workshops and courses they offer include Agri-Food Business Planning, Recipe for Success, Introduction to Food Safety, Adopting Digital Technology, ABC HACCP Plan Tool Kit Home Study Program, GMP/HACCP Training, and others. They are an excellent resource for anyone looking to begin food processing.

Certified Organic Associations of BC

The Certified Organic Associations of BC (COABC) is an umbrella organization that represents nine organic certifying bodies within BC[16]. COABC is empowered by the BC Organic Agricultural Products Regulation to implement an organic certification accreditation province-wide. COABC accredits regional and ISO-accredited certifying bodies in many locations throughout the province. COABC's statements of purpose are as follows:

- To promote organic agriculture and to provide education on organic agriculture and organic foods;
- To represent members in matters relating to the Agri-Food Choice and Quality Act of British Columbia;
- To develop and administer an organic certification accreditation program for members;
- To grant permission for the use of the phrase "British Columbia Certified Organic" and program symbol on agricultural product labels certified by members;
- To ensure there is a pool of qualified verification officers;
- To facilitate research and marketing activities on behalf of member organizations;
- To provide information to the public on behalf of the members;
- To develop and maintain an approved list of materials and standards for use in organic Agricultural products certified by members; and
- To be responsible for incidental matters related to the above-referenced activities.

Their website provides a lot of information on transitioning to organic production, including toolkits for producers and processors. They also offer a valuable Cyber-Help page with lots of resources and FAQs on a variety of topics. This can be found at:
http://www.certifiedorganic.bc.ca/rcbtoa/training/marketing.html.

[15] https://www.ssfpa.net/
[16] www.certifiedorganic.bc.ca

Success Stories

In the Southern Gulf Islands:

Hope Bay Hop Farm

Hope Bay Hop Farm is located on North Pender Island and is in their second year of production. This year they provided hops for Hoyne Brewing Company located in Victoria. The farm uses organic methods to produce all of their crops, but are currently not certified. They harvested their first crop of Cascade hops in the fall of 2015, which went into making the Wolf Vine wet-hopped pale ale at Hoyne Brewing.

Deacon Vale Farm

Deacon Vale Farm is a small, family farm located on Mayne Island. The farm is owned and operated by the Abbott and McDougall families. They produce a wide variety of crops and meat, which is for sale on Mayne at the Farm Gate Store, as well as at locations off Mayne. Value-added products are also produced and include tomato sauce, relish, pickles, chutney, jellies, and jams. More information can be found here: http://www.deaconvale.com/.

Mayne Island Farm Gate Store

The Mayne Island Farm Gate Store is operated by Don and Shanti of Deacon Vale Farm. The store offers a variety of food staples as well as prepared foods and preserves from Deacon Vale. The store purchases from other local farms on Mayne Island when possible, as well as suppliers from Vancouver Island to supplement their own farm produce and meat.

Christina's Garden

Christina's Garden is also located on Mayne Island and is a small market garden, mainly producing sprouts, microgreens, shoots, and edible flowers for sale on the island and in the Victoria region. They also produce vegetables, fruit and bedding plants for home gardeners and create flower bouquets in the spring, summer and fall for the Mayne Island Farmers' Market.

Campbell Farm

Located on Saturna Island, the Campbell Farm has been producing beef since 1945 and lamb since 1960. The farm constructed an abattoir is 1959 to meet the meat inspection regulations at the time. It has since been upgraded to meet current regulations and operates as a Class A facility. The farm mainly raises its own animals for processing, and custom cut and wrap of beef and lamb. Products are marketed primarily to local businesses on Saturna including the café. The abattoir does provide some custom slaughter services for lamb for producers on Mayne and Pender Islands. More information can be found here: http://bcabattoirs.org/member/campbell-farm/.

Galiano Food Program

The Galiano Food Program "strives to increase Galiano Island's food security through community-building activities and skills sharing". The Food Program is a non-profit organization that relies on volunteer supporters and three part-time coordinators. Most of the activities are free, or by donation, and decisions are made in consultation with the community. The Food Program has initiated a number of projects including: the Community Kitchen at the Galiano Community Hall; gleaning teams; a Farmers' Institute; meals program; Islands Food Security Conference; Seniors' Soup Program; Seniors' Soup Garden; fruit tree mapping; and other events, workshops, food growing initiatives, and educational opportunities.

Examples Outside of the Southern Gulf Islands:

Merville Organics

Merville Organics is located in the Comox Valley and is cooperative of five local farms. All farms are transitional to organic or certified organic and sell mainly through the Comox Valley Farmers' Market and a Community Supported Agriculture (CSA) box program. The farms that make up the cooperative include Amara Farm, Ripple Farm, Green Arrow Farm, Umbella Farm and Kloverdalen Farm. Their cooperative is based on the Saanich Organics model. More information about Merville Organics can be found here: http://mervilleorganics.ca/.

Saanich Organics

Saanich Organics is a community of farmers from small, certified organic farms that work together to produce for the Saanich area. The farms include Feisty Field Organics Farm, Three Oaks Farm, and Northbrook Farm. They also work with other farmers in the region to supplement their production. They market their products at the Moss Street Market, James Bay Market and through a residential CSA box program. They also have a commercial division that serves restaurants and grocery stores. More information can be found here: http://saanichorganics.com/.

Hornby/Denman Growers and Producers Alliance

The Hornby/Denman Growers and Producers Alliance is a group of farmers that came together to advocate for all Hornby and Denman agricultural sectors and their offshoots, and to provide a forum for cooperation, communication and support among island growers and producers. The group works to establish year-round marketing opportunities for island agricultural products and develop local processing options for adding value to local products. They also provide educational opportunities for the local communities regarding agriculture and food. The Alliance runs a number of initiatives and events including:

- Denman Island Apple Fest
- A gleaning program for apple and pears
- Educational workshops focused on issues such as marketing, animal husbandry, farm safety, organic certification and more
- Local food and film night
- Purchasing of small-scale processing equipment such as a juice press and chicken plucker

- Website listing for local farms on both Denman and Hornby

The organization is very active and always looking for new opportunities. Currently, they are working on obtaining a portable cooler to store food. More information and the farm directory can be found on their website at: https://islandagriculture.wordpress.com/.

Salt Spring Island (SSI) Agricultural Alliance

The Salt Spring Island (SSI) Agricultural Alliance is an incorporated non-profit society that was developed in 2008 to oversee the implementation of the SSI Area Farm Plan. The members of the organization represent interests in agriculture, food production, and sustainable economic development. The Agricultural Alliance also acts as an advocacy organization by representing agricultural interests to all levels of government and works to find secure funding to support agriculture and agricultural infrastructure on SSI. In 2012, an abattoir was opened for slaughter of poultry and lamb. A separate organization was created (Salt Spring Abattoir Society) to manage the facility, but the Agricultural Alliance was instrumental in pulling together funding for the facility through grassroots efforts and support from the Vancity Envirofund grant. More information about the Alliance and their programs can be found here: http://plantofarm.org/.

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