

Organic Agriculture in British Columbia

Organic Statistics 2012

Anne Macey
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INTRODUCTION

Organic Agriculture in British Columbia provides information about the organic farms in the province, and the food processing sector they support, based on numbers for the 2012 organic certification year. It is the first comprehensive study since the introduction of the Canada's Organic Products Regulation in 2009. Organic sales in BC are 22% of the total organic food and beverage sales in the country although BC is home to only 13% of the country's population and the organic market is continuing to grow at an average of 11% a year. While the organic dairy and poultry sectors are growing correspondingly, organic crop production cannot meet the demand as evidenced by the quantities of imported organic fruit and vegetables which are seen in the mainstream grocery stores. The data in this report takes a closer look at the levels of domestic production which supplies the expanding market described in the Canadian Organic Trade Association report *The BC Organic Market; Growth, Trends and Opportunities, 2013*.

The 2012 data was provided either by the accredited organic certification bodies (CBs) operating in the province, or obtained from information published on the websites of the CBs, COABC, and CAEQ. The numbers represent all the certified operations in the province, both those certified under the BC Certified Organic Program and those certified under the Canadian Organic Regime. Additional information was provided by Statistics Canada based on the 2011 Agricultural Census, the BC Poultry Marketing Boards, and Agriculture and Agri-food Canada

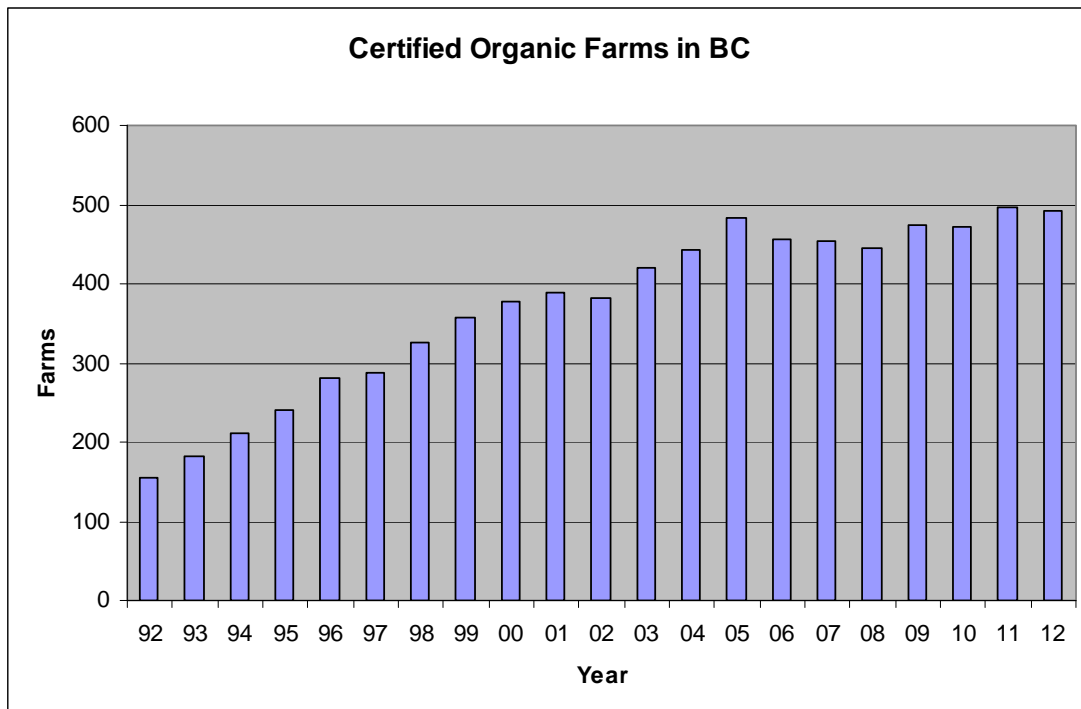
The information collected for the 2012 certification year can be compared with data collected by Anne Macey on behalf of Canadian Organic Growers over the last 17 years however it is the first time figures are presented on a regional basis within the province. The historical information also allows some comparisons with the levels of production before and after the implementation of the 2009 federal Organic Products Regulation (OPR).

ORGANIC FARMS & FARM OPERATORS

At the end of 2012 there were 492 certified farm operations and 30 farms in transition under supervision of the certifiers. These numbers have changed very little since 2011 and it appears there are as many leaving certification as there are new entrants. Of those leaving some operators are retiring, but others are continuing to farm organically selling direct to consumer or in short supply chains and do not see a benefit to certification. With no form of registration or other method of verifying production practices there is no accurate information on the number of farms making organic claims who do not engage in the organic certification process.

Statistics Canada May 2011 Census Data shows 470 farms with certified organic production which corresponds to the 2010 certification year. This number represents 2.4% of all farms in the province in 2011 and 2.9% if all farms claiming transitional status are included. Thirty seven percent of the farms are only certified under the BC Certified Organic Program and do not ship organic product out of province.

Figure 1: Certified organic farms in BC 1992-2012



Map of the Agricultural Regions of British Columbia



Data was also collected by region. The regional classifications are based on the divisions used by the Agricultural Census with one exception; in the tables that follow the Cariboo region includes the few farms reported in the Nechako and North Coast regions. The majority of the certified farm operations (236) were reported from the Thompson–Okanagan agricultural region; a large area extending from Cache Creek to the US border.

Table 1: Type and number of certified farm operations by agricultural region

	BC	Th-OK	Lower mainland	Van. Is. - Coast	Kootenay	Peace	Cariboo NC -N
All farms 2012	490	238	125	69	22	20	16
Transitional farms 2012	30	15	5	7	1	0	2
All farms - 2011 Census	470	219	112	69	36	17	17
Dairy cattle and milk production (2011)	13	4	6	1	2	0	0
Beef cattle ranching and farming (2011)	15	4	1	3	3	2	2
Hog and pig farming (2011)	2	2	0	0	0	0	0
Poultry and egg production (2011)	26	1	23	0	1	0	1
Sheep and goat farming (2011)	5	3	1	0	0	0	1
Other animal production (2011)	21	8	3	3	1	3	3
Oilseed and grain farming (2011)	9	2	0	1	1	5	0
Vegetable and melon farming (2011)	96	40	24	18	13	0	1
Fruit and tree nut farming (2011)	162	119	28	11	4	0	0
Greenhouse, nursery & floriculture production (2011)	45	7	16	17	2	0	3
Other crop farming (2011)	76	29	10	15	9	7	6

Farms types are classified according to the predominant type of production based on potential receipts e.g. a farm with 60% of income from hogs, 20% from beef and 20% from wheat is classified as a hog farm. Therefore the numbers in Table 1 do not take into consideration that one farm may have more than one type of farm enterprise. Total numbers of each enterprise type will be larger than the numbers reported here.

Organic farms in BC represent 12.7% of the total number in Canada with three other provinces having more organic farms: Saskatchewan (27%), Quebec (26%) and Ontario (18%). (Percentages may change slightly when all countrywide data is updated for 2012). BC has more organic farms producing certified organic fruit, vegetables and greenhouse products than any other province in Canada with 60% of the fruit and nut tree farms and 38% of the vegetable and melon farms.

Statistics Canada 2011 Census of Agriculture data shows gross receipts from organic farming in BC reported as \$169.2 M which is 17.6% of the total gross receipts generated by organic farming in Canada (\$906.5 M). Total net income in BC was 14.3% of the Canadian total with operating expenses of \$144.7 and \$791.4 M respectively.

270 of the 470 farms reported having employees and the total number of people employed was 2,826. Of these 726 were employed year round and 2100 employed on a seasonal basis with the majority on the fruit farms (1073 people) and vegetable farms (581 people). Greenhouse operations (269 people) and dairy farms (141 people) had the most full time employees.

Farm operators

Demographically the organic farm population in BC differs from that of the rest of Canada. The average age of organic farm operators is 50 compared with 55 for the rest of Canada although in some regions of the province the average is the same (see Table 2). BC also has more women operators (38%) than the Canadian average (30%) with Vancouver Island standing out as having more female farm operators than any other region (52%). A lower proportion of operators in BC work full time on the farm; 42% compared with 49% for the rest of Canada, but the numbers working more than 30 hours a week off the farm are only slightly less, 23.3% compared with the Canadian total of 25.6%.

Table 2: Number of operators on organic farms

Region	Total # operators	on farms with 1 operator	on farms with 2 or more operators	male	Female	under 35	35-54	older than 55	Average age
Canada excluding Territories	5,585	1,995	3,595	3,895	1,685	675	2,590	2,310	55
British Columbia	750	200	540	455	285	60	305	385	50
Vancouver Island-Coast	130	20	105	60	65	5	50	70	55
Lower Mainland-Southwest	180	50	130	110	70	25	75	75	55
Thompson-Okanagan	330	115	220	215	115	25	125	180	50
Kootenay	60	20	45	35	25	10	30	25	50
Cariboo	25	0	20	15	5	0	10	10	55
Peace River	30	5	20	15	5	0	5	15	55

Table 3: Number of operators working full and part time on the farm and numbers with off-farm paid work

Region	Hours worked on farm				Non-Farm Work				
	>40hrs	30-39 hours	20-29 hours	<20 hours	none Paid	<40 hrs paid	30-39 hours paid	20-29 hours paid	<20hrs paid
Canada excluding Territories	2,760	820	725	1,280	3,180	750	680	370	600
British Columbia	320	125	120	185	425	90	85	45	100
Vancouver Island-Coast	45	35	20	35	70	15	25	10	20
Lower Mainland-Southwest	90	30	25	45	95	15	20	10	30
Thompson-Okanagan	150	50	55	70	200	45	30	15	40
Kootenay	25	5	15	15	25	5	10	0	10
Cariboo	10	0	0	10	15	5	5	5	5
Peace River	10	5	5	15	10	5	5	0	0

ACREAGE

A total of 70704 ac/28614 ha were reported in organic production in 2012 with an additional 5161 ac/2088 ha under organic management but with transitional status or less than 36 months without the use of prohibited materials.

The acreage charts below do not include large acreages of crown range land that are leased for grazing organic livestock or other extensive areas of wild land reported by organic farmers that are not used for production purposes. Over the last 10 years acreage in organic production has increased by 153% while over the same period the number of operators with organic production has only increased by 27%. Percentage increases in the last few years (27% since 2009 and 17% since 2011) are less reliable due to incomplete acreage data and estimated numbers for those years.

Figure 2: Acreage in organic production 2002-2012

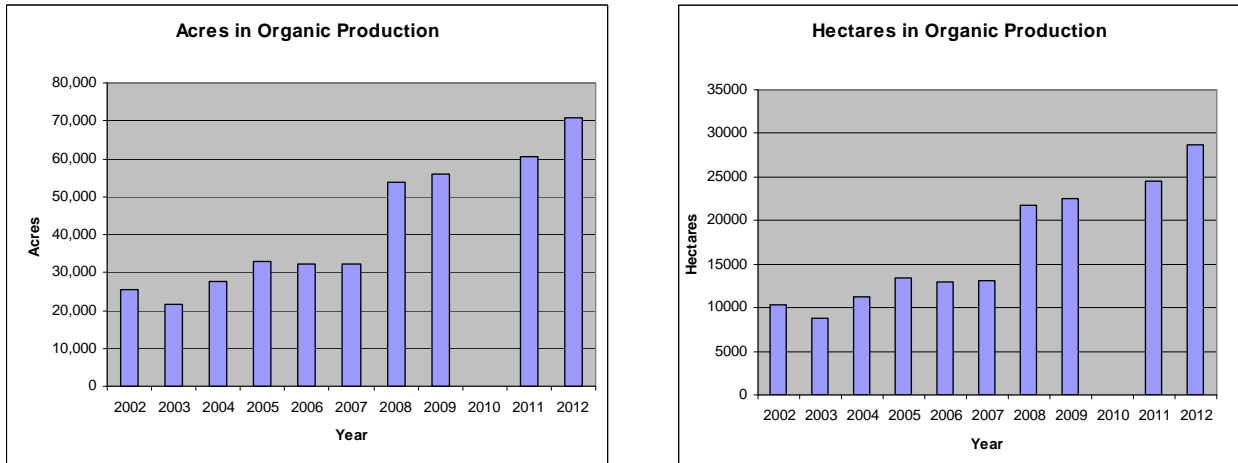
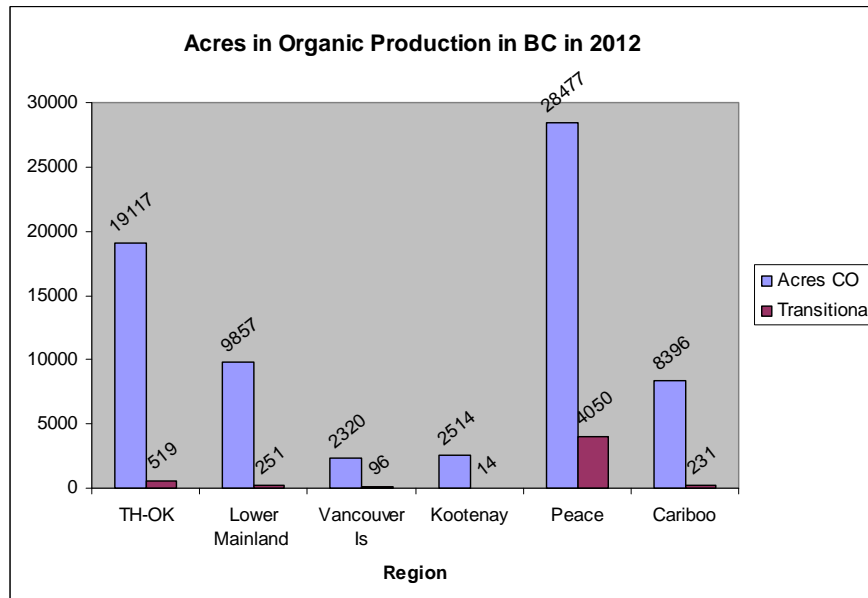


Figure 3: Acreage in organic production by BC agricultural region



Acreage by Crop Type

Vegetables:

Excluding greenhouse crops there were 2139 ac/866 ha reported in organic vegetable production but just over half of this was reported in the general categories of vegetables (472 ac/191 ha), fruit and vegetable (508 ac/206 ha), and ground crops (39 ac/16 ha) so information on acreage of individual crop type is lacking. Many of these acres are on mixed market farms where much of the produce is sold direct; at farmers markets, to restaurants or to local stores. There are at least 491 ac/196 ha of potatoes (98% in Lower Mainland), 426 ac/172 ha of beans (LM), 51 ac/20 ha of broccoli, 44 ac/18ha squash and pumpkins (LM), 34 ac/14 ha of carrots (TH-OK), and 26 ac/10.5 ha of garlic (TH-OK, K). Next in order of importance are cabbage, onions and beets. Crops are grown for the fresh market and for freezing (beans). Corn acreage reported (see table 6) was not identified by type and includes sweet corn for the fresh market and corn grown for livestock feed.

Currently the growth in mainstream sales of organic vegetables suggests there is room for expansion especially of crops which can be stored for sales through the winter months such as beets, carrots, cabbage, potatoes and onions.

Greenhouse: There are 53 ac/ 21ha of organic greenhouses in the lower mainland used for the production of transplants as well as tomato and pepper crops. Also reported were 170,000 sq ft of greenhouses on Vancouver Island, 41,000 sq ft in the Thompson–Okanagan region and 11,800 sq ft in the Cariboo.

Mushrooms: The Lower Mainland is the main producing area for organic mushrooms with close to 19 acres and several different varieties grown including shitake, reishi, oyster, white button, crimini, portabella and enoki.

Fruit & Nuts

A total of 1891 ac/765 ha of organic fruit and nut production was reported and an additional 508 ac/206 ha of mixed fruit and vegetables. Sixty six percent of the production takes place in the Thompson – Okanagan region (mainly tree fruits and wine grapes) followed by the Lower Mainland with 22%, where the predominant crops are blueberries and hazel nuts.



Table 4: 2012 BC Organic fruit & nut acreage by region

Crop type		Cariboo	Kootenay	Lower Mainland	Thompson-Okanagan	Vancouver Island	Total
Fruit	ac	4.35	14.3	196.12	1376.14	74.21	1665.12
	ha	1.76	5.79	79.37	556.9	30.03	673.85
Nuts	ac			215.6	9.6		225.2
	ha			87.25	3.98		91.14
Mixed fruit/vege	ac	2.1	17.5	123.5	203.75	161.43	508.3
	ha	0.85	7.08	49.98	82.45	65.44	205.69

Table 5: 2012 BC Organic fruit & nut acreage by type

Tree Fruits	ac	ha	Berries	ac	ha	Misc	ac	ha
Apples	653	264	Blueberries	177.7	71.9	Wine grapes	270.9	109.6
Tree fruit	257	104	Small fruit	28.7	11.6	Table grapes	15.0	6.1
Peaches	67.5	37.3	Strawberries	6.9	2.8	Grapes	7.3	2.9
Pears	61.5	24.9	Raspberries	5.3	2.1	Misc Fruit	6.3	1.9
Plums	20.8	8.4	Blackberries	3.2	1.3			
Cherries	46.4	18.8				Hazelnuts	209.6	84.8
Apricots	19.0	7.7				Walnuts	7.6	3.1
Nectarines	15.0	6.1						

Total tree fruit acreage is 1140 ac/461 ha which is only 50 ac/ 20 ha more (4.4%) than reported in 2005. Cherries are the exception; acreage doubled following the registration of approved pesticides for organic cherry production which may also explain the decline in imports of organic cherries. Excluding the tree fruit sold at farmers markets, it is estimated that 50% of the crop sold into retail is sold in BC; 35% goes to other provinces, 15% to the US and 5% overseas.

Berry acreage, particularly blueberry acreage, has increased by 83 ac/33.6 ha or 28% in the same period (59.5 ac/24.1 ha reported in 2005). Imports of organic blueberries into BC in 2012 were only 66% of the amount imported in 2011 suggesting some replacement with domestic production.

Wine grape acreage has also increased significantly with 270.9 ac/109.6 ha in production compared with 142.3 ac/57.6 ha in 2005.



Grains and pulses

A total of 6966 ac/2819 ha of grains and pulses were reported in the province with 3189 ac/1291 ha in the Peace, 2104 ac/851 ha in the Thompson –Okanagan regions and 1105 ac/447ha in the Lower Mainland and smaller acreages in the Kootenay (360 ac/146 ha), the Cariboo (141ac/57 ha) and on Vancouver Island (67ac/27ha). In addition to crops listed in Table 6, small acreages were reported of peas, lentils, triticale, kamut, and buckwheat. As well as grains produced for livestock food there is a small but growing interest in direct to consumer sales with organic grain CSAs now established in the Lower Mainland and the Kootenays.

Table 6: Acreage of organic grains by region

Crop	Kootenay		Lower Mainland		Peace		TH-OK		BC Total	
	Ac	Ha	Ac	Ha	Ac	Ha	Ac	Ha	Ac	Ha
Barley	150	61	263	106	908	367	602	244	1923	778
Corn*			637	258			134	54	771	312
Oats	53	21			1162	470	235	95	1507	610
Rye	18	7			292	118	24	9	334	135
Wheat	75	30			280	113	38	15	398	161
Spelt	10	4			4	<2	353	143	367	149
Flax	40	16			190	77	16	6	246	100
Sunflowers							125	51	125	51
Grains type unidentified			62	25	280	113	528	214	1016	411
Totals all grains/ pulse crops	360	146	1105	447	3189	1290	2104	851	6966	2819

*sweet corn and forage/silage corn

Forages Crops/Pasture

Table 7: Acres of organic forage crops & pasture by region

	Cariboo	Kootenay	Lower Mainland	Peace	TH-OK	VI	Total
Alfalfa		68		675	302		1045
Clover				325	3	4	332
GM/ plowdown		3	3	354	747	6	1113
Grass			136	520	209	20	894
Hay	789	850	1452	5748	2031	605	11475
Hay/ Pasture	2984	24	2800	570	10783	401	17562
Pasture	1089	857	742	5279	1684	274	9925
Native pasture	1280	243		820			2343
Pasture/wild/ bush	273			2679	419	5	2952
Fallow			119	1176	374		1669
Range	3585						3585
Crown land grazing leases	150,000	1000s of acres			295,000		?

Table 8: Hectares of organic forage crops & pasture by region

	Cariboo	Kootenay	Lower Mainland	Peace	Th-OK	VI	Total
Alfalfa		27		273	122		422
Clover				131	<2	<2	134
GM/ plowdown		<2	<2	143	302	2	4512
Grass			55	210	85	8	362
Hay	319	344	587	2326	822	245	4644
Hay/ Pasture	1208	10	1133	231	4364	162	7107
Pasture	441	347	300	2136	681	111	4016
Native pasture	518	98		332			948
Pasture/ wild/ bush	110			1084			
Fallow			48	476	151		
Range	1451						1451
Crown land grazing leases	60703	1000s of acres			119382		?

Other crops

In 2005 there was barely 1 acre of organic **hops** in the province. The 9 acres reported for 2012 reflects a growing interest in organic beer. Only 17 acres of **herbs** (medicinal & culinary) were reported in 2012 which is considerably lower than the 300 acres reported in 2005.

LIVESTOCK

Poultry Production

Most of the organic poultry and egg production in the province is located in the Lower Mainland. Numbers given in the table below provides some indication of numbers although data provided did not always indicate type of bird. Unless indicated otherwise “poultry” was assumed to be meat birds but clearly the number of pullets is not indicative of the number of pullets that would be raised as replacements each year so the assumption may not be correct.

Supplementary information provided by the BC Marketing Boards suggests the data in Table 9 is missing information from some of the larger organic poultry producers operating in the province.

Table 9: BC Organic poultry numbers reported for 2012

Region /Type	Layers	Pullets	Meat birds /Broilers	Turkeys
Cariboo	267		3309	175
Kootenays	110		2300	
Lower Mainland	97083	13861	205411	14700
Peace	38			
Thompson Okanagan	899		1099	33
Vancouver Island	1376		4446	300
Totals	99773	13861	216565	15208
Number of farms	53	2	24	9

According to the BC Egg Marketing Board, 700 million dozen eggs were produced in BC in 2012, and 10 million of these were sold as speciality eggs: 3.2 million as certified organic; 3.5 million as free range and 3.4 million as free run. The COTA Organic Market Report shows organic egg sales have increased by 6.83% annually since 2008 and there is likely still room for growth. However cost and availability of organic feed are considered limiting factors for increasing organic egg production. In June 2013 the cost of organic feed was almost triple that of conventional feed. For the larger producers it is also possible that a lack of available pasture land to provide the area required by the organic standard (CAN/CGSB 32.310) limits adoption of the organic system.

The Turkey Board reported 91,835 kg live weight for organic turkeys in 2012 down from 98,322 kg in 2009. Given the improbability of an average weight of 14.11 kg clearly there are numbers missing from Table 9 above.

Chicken Marketing Board data shows the production of organic chicken has fluctuated over the last few years with 2012 quantities 31% higher than in 2009. The 2012 figure in the table below represents over 600,000 birds, far in excess of numbers reported indicating missing data from the CBs.

Table 10: Quantity of organic chicken (BCCMB)

2009	918,210 kgs
2010	938,548 kgs
2011	919,158 kgs
2012	1,205,102 kgs

Unfortunately the available sales figures for mainstream retail sales for fresh organic meat and poultry (\$2.45M) are not broken down by category.

Meat Production

Numbers of organic livestock reported by CBs are shown in Table 11 which gives some indication of the size of the herd. However it was not always clear in the data provided whether the numbers reflected all age classes, breeding, and non-breeding animals to be sold into the meat market or just one class of livestock on the farm. Beef and bison numbers have significantly increased since 2005. Organic pork and lamb production has declined.



Table 11: BC Organic livestock numbers in 2012

Region/Type	Beef cattle	Bison	Sheep	Pigs
Cariboo	887	0	470	122
Kootenay	348	0	0	39
Lower Mainland	12	0	0	0
Peace	895	202	25	4
TH-OK	3007	84	1657	11
Vancouver Island	200		0	36
Totals	5349	286	2152	212
Total Number of farms	23	3	7	9

Dairy Production

Organic milk production continues to increase in the province with the majority of production in the Lower Mainland. In BC organic milk is 2.84% of the total milk production in the province while nationally the percentage is 1.19%. The organic raw milk premium is also higher in BC at \$0.30/litre BC compared with \$0.27 in Ontario and \$0.25 in Quebec. BC produces 21% of the organic milk in Canada with only 8% of the dairy farms (17 of the 218 total).



Table 12: Number of dairy animals reported in 2012 (all age classes)

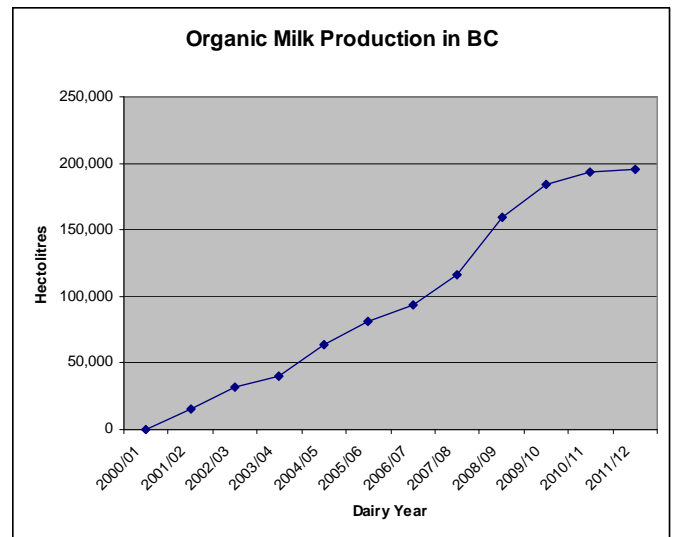
Region	Dairy Cows	Dairy goats
Cariboo	8	14
Kootenay	185	0
Lower Mainland	4043	345
TH-OK	573	47
Vancouver Island	30	0
Totals	4839	406



Table 13: Growth in organic dairy sector

Year	BC	
	hl	Producers
2011/12	195,945	17
2010/11	192,922	14
2009/10	183,892	15
2008/09	159,057	15
2007/08	116,045	14
2006/07	93,538	14
2005/06	81,164	11
2004/05	63,392	5
2003/04	39,989	3
2002/03	31,989	3
2001/02	15,749	2
2000/01	198	2

Figure 4: BC Organic milk production 2000-2012



Source: Organic Dairy Industry in Canada. 2012 edition AAFC, with data from BC Milk Marketing Board

Four enterprises were identified as producing certified livestock feed rations.

Bees: No data available. There is one known producer of certified organic honey in the province and maybe more.

PROCESSING AND HANDLING

Numbers of processing and handling operations of organic product continue to increase with a total of 209 operations in 2012 compared with 185 in 2011 and 178 before the OPR. 65% are located in the Lower Mainland.

These figures include a wide range of enterprise types including manufacturers of multi-ingredient products, on-farm processing, seed cleaning, packing and labelling, grading, distribution, and brokerage. While many are based on a BC supply of raw organic product (milk, fruits, vegetables, cereals, meats), a significant number of enterprises rely on organic agricultural products not grown in the province (e.g. coffee, chocolate, soy).

Coffee roasters are the most abundant of all the enterprise types with a total of 25 reported. Import and sales data confirm the success of organic coffee. In 2012 BC imported \$41.8 M of certified organic unroasted coffee and organic coffee sales in BC foodservice were estimated at \$40 M. Organic coffee is also the top seller in the BC mainstream organic market with \$15.4 M in sales ahead of organic milk (\$ 9.77 M) and yogurt products (\$11.79 M).

Figure 5: Number of processors & handlers of certified organic product in BC

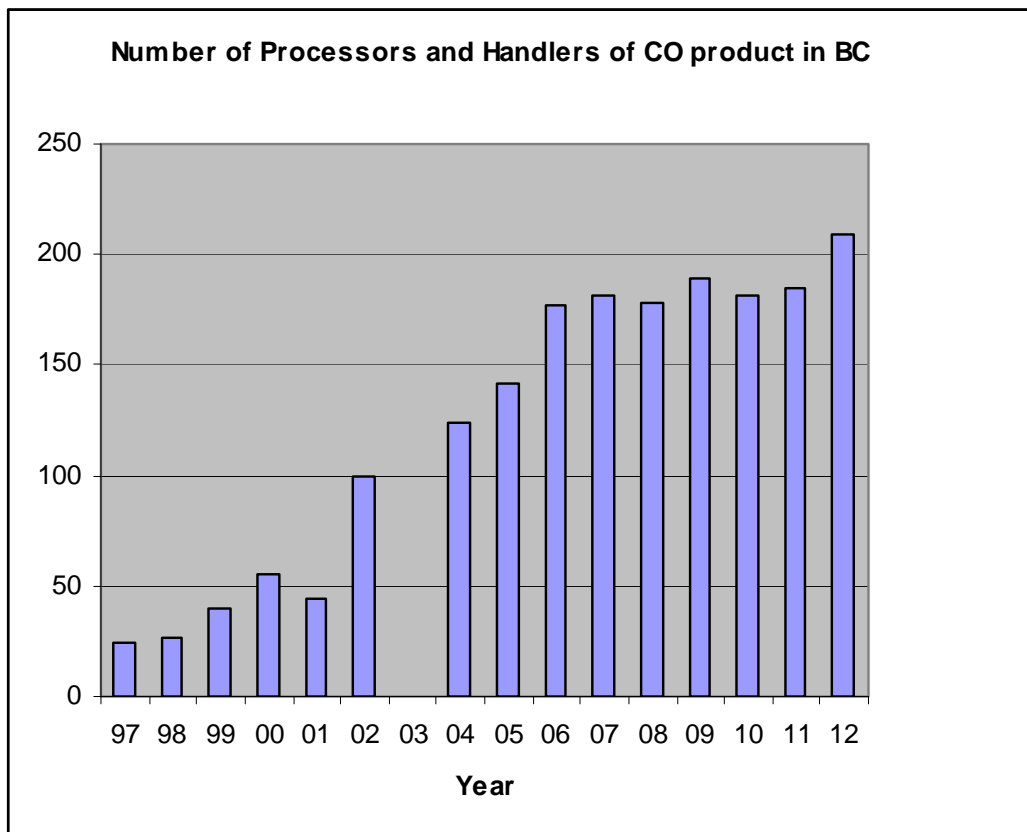


Figure 6: Distribution of processors & handlers by region

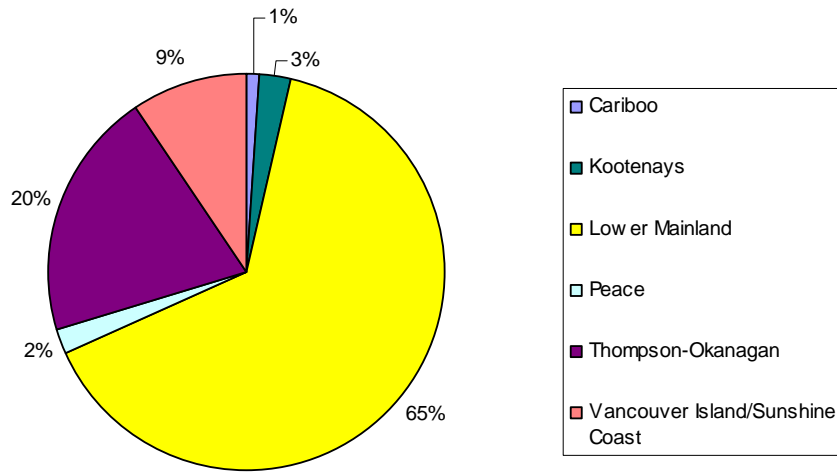
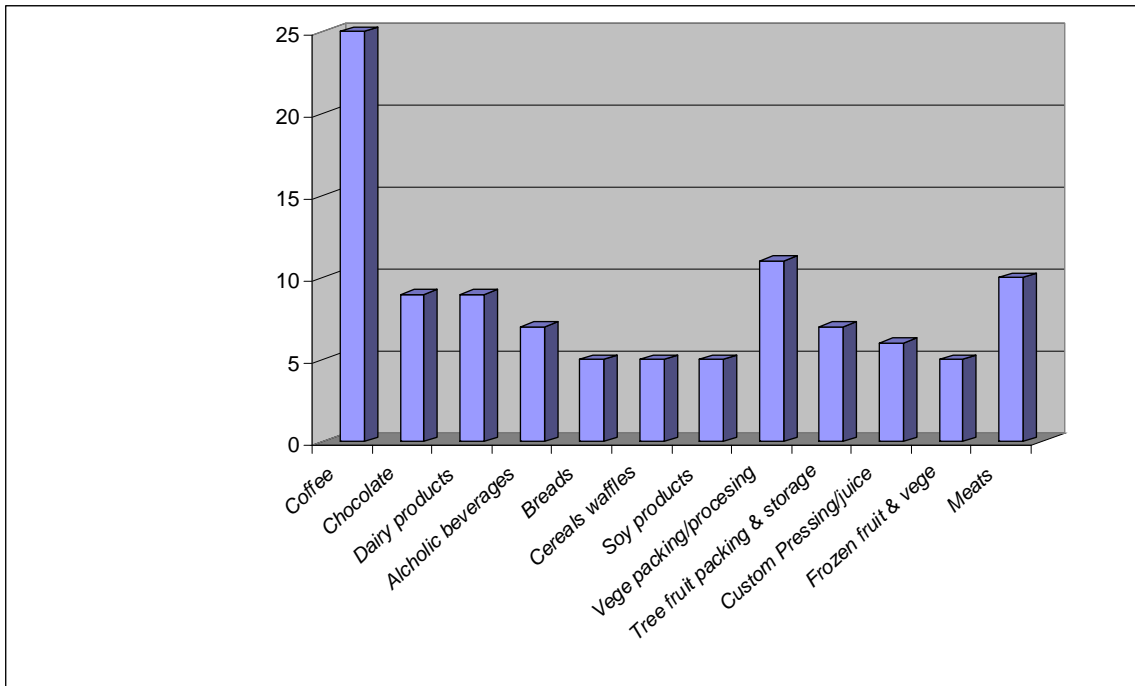


Figure 7: Number of enterprises by type of organic product



In Summary

BC Organic Farms & Farm operators:

- ◆ In 2012 there were 492 certified farm operations in BC plus 30 farms in transition under supervision of the CBs.
- ◆ The majority of the certified farm operations (236) were reported from the Thompson–Okanagan agricultural region.

According to Statistics Canada 2011 Census of Agriculture:

- ◆ Only 2.4% of farms in the province are certified.
- ◆ Organic farms in BC represent 12.7% of the total number of organic farms in Canada.
- ◆ BC has more organic farms producing certified organic fruit, vegetables and greenhouse products than any other province in Canada with 60% of the fruit and nut tree farms and 38% of the vegetable and melon farms.
- ◆ BC organic farms had gross receipts 169.2M and operating expenses 144.7M
- ◆ BC organic farms support 2826 employees: 726 year round and 2100 seasonal farm workers.
- ◆ Total workforce (operators & employees) is 3576 people.
- ◆ The average age of organic farmers in BC is 50.
- ◆ 38% of BC organic farm operators are women and on Vancouver Island 52% of organic farm operators are women.

Acreage in organic production:

- ◆ 70,704 ac/28.614 ha are in organic production.
- ◆ Organic acreage in BC has increased 153% in the last 10 years.
- ◆ 2139 ac/866 ha in vegetable production
- ◆ 1891 ac/765 ha of organic fruit & nut production with 66% in the Thompson –Okanagan Region.
- ◆ Wine grape acreage is 271 ac /110 ha nearly double that in 2005.
- ◆ 6966 ac / 2819 ha grains and pulses mainly for livestock feed.

In 2012 organic livestock farms produced:

- ◆ 2.84% of BC's total milk production and 21% of the total organic milk in Canada (from 17 farms)
- ◆ 3.2 Million dozen organic eggs
- ◆ 1.2 Million kgs of organic chicken
- ◆ 91,835 kg of turkey

Processing and handling

- ◆ 209 enterprises with 65% in the Lower Mainland; 25 of which are organic coffee roasters.