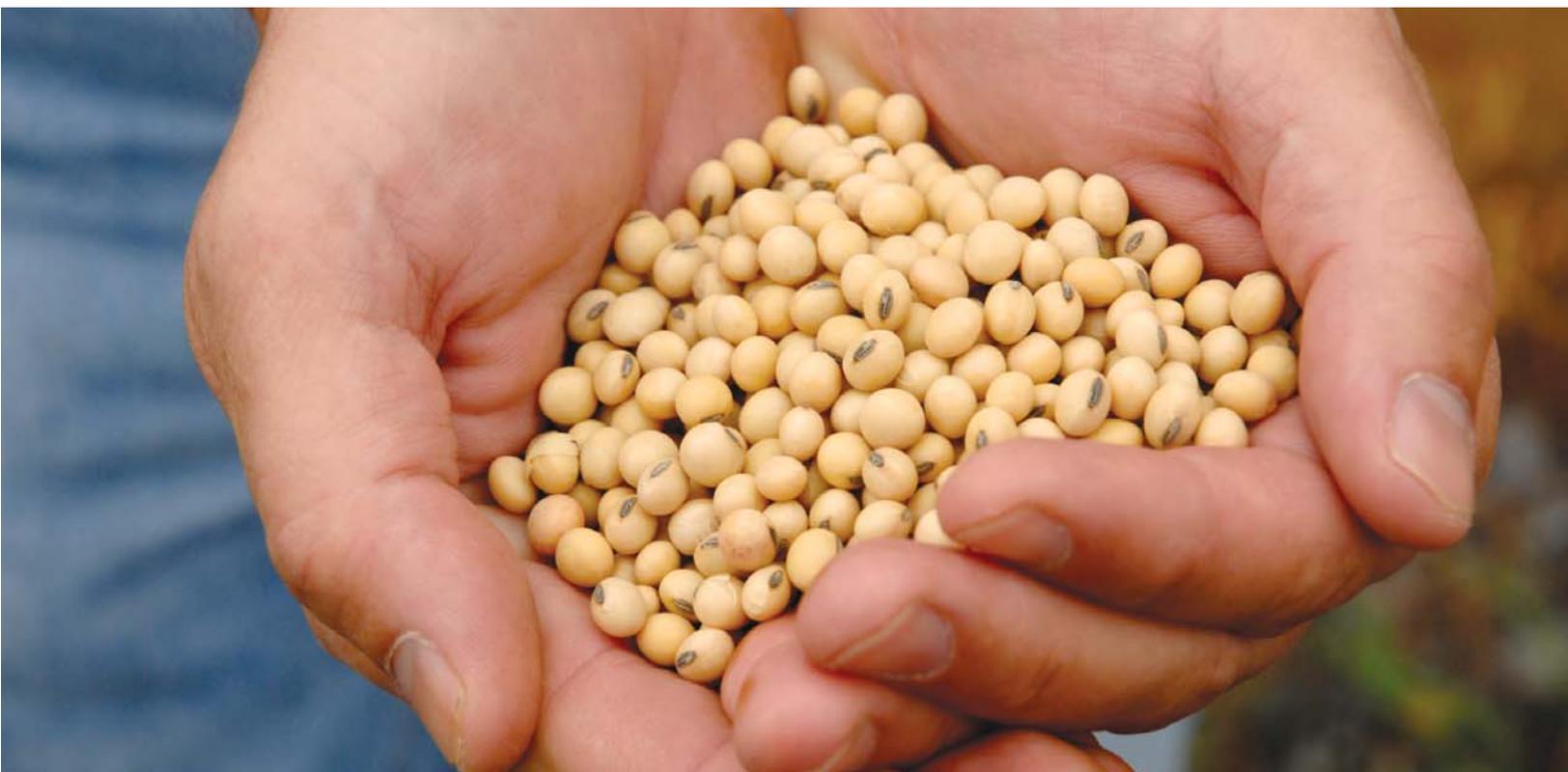


Prince Edward Island Organic Soybean Market Study and Strategic Plan

Submitted on:
March 31, 2012



Prepared for:
PEI Certified Organic Producers Co-operative

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Executive Summary

The Prince Edward Island Organic Soybean sector is a small, dynamic and growing sector. From 82 acres in 2003 to over 1600 acres in 2010, this group of producers is looking to continue expanding production and to diversify their market opportunities. What began as a very broad search for any and all soybean markets in the world turned into a more targeted search following a strategic planning session with the growers.

A vision was set to grow the industry to 5000 acres by 2022 with a yield of 1.4 tonnes per acre. At that time, one quarter of the crop will be marketed to livestock growers in Atlantic Canada and the New England states and the remainder to Asian companies as food soybeans. In the short term, the growers will focus on actions to move them toward this vision including research to increase yields in the province, market research for the short and long term, determining the cost of organic production in Prince Edward Island, working co-operatively to achieve the vision, and setting up the administration and coordination to support these efforts.

It was determined that in the very short term, the focus would be on filling local markets and nearby New England states markets. At the same time, the growers will work with a new PEI company that is currently working to develop food soybean markets in Europe and Asia. Local, other domestic, New England and other North American markets are catalogued in the report as well as the resources available to begin the process of investigating and developing export markets.

Introduction

The acres of organic soybean production is on the rise in Prince Edward Island - from 82 acres in 2003 to over 1600 acres in 2010. Up until 2009, markets were easy to access and price was excellent. As is typical, markets never stay the same - they can fluctuate greatly from one year to the next and even within one year. This report catalogues organic soybean markets available at the time of writing which served as the basis for the strategic decisions of Prince Edward Island organic growers related to their soybean production.

The report also catalogues market reports and resources available to assist growers in developing and accessing markets - both domestic and export. As part of the strategic marketing decision, the PEI organic growers need to identify how this market information will be monitored on a continual basis.

Methods

The first step was to find information on current levels of soybean production in Canada. There is very little measurement of organic production in Canada. Although the percentage growth in organic demand and organic production is high, it is still a relatively small volume as a percentage of total food production. There has been little collection of data on organic production, especially data specific to a particular organic crop or type of organic livestock. Until the 2001 census, Statistics Canada was not measuring organic production in Canada, and the questions in that census were limited to:

- Does this operation produce any certified organic products for sale?
- What certified organic products are being produced in 2001?
 - Fruits, vegetables or greenhouse products
 - Field crops (grains, oilseeds, etc.)
 - Animals or animal products (meat, milk, eggs, etc.)
 - Other (maple syrup, herbs, etc.)
 Specify: _____

Questions regarding organic production in the 2006 Census of Agriculture were slightly expanded to:

- Does this operation produce organic or non certified organic products for sale?
- What is the status of the organic products in 2006?
 - Certified by an organic certifying agency
 - Transitional
 - Organic but not certified
- If this operation produces certified organic products, or if this operation is in the process of becoming certified (transitional), print the name of the certifying agency.
- For the organic products being produced for sale on this operation in 2006, report the certification status for each category. (Fill in all applicable circles.)

Organic Products	Certified	Transitional	Organic but not certified
Hay or field crops (grains, oilseeds, etc.)	○	○	○
Fruits, vegetables or greenhouse products	○	○	○
Animals or animal products (meat, dairy products, eggs, etc.)	○	○	○
Maple products	○	○	○
Other (herbs, etc.)—Specify: _____	○	○	○

Questions related to organic production in the 2011 Census of Agriculture included:

- Does this operation produce any ORGANIC products for sale?
 - No - Go to page 16
 - Yes



- What is the status of the organic products in 2011? (Fill in all applicable circles.)
 - Certified by an organic certifying body
 - Transitional (in the process of becoming certified)
- Enter the name of the certifying body.
- Report the status in 2011 for the organic products produced for sale. (Fill in all applicable circles.)

Organic products for sale

 - Field crops (grains, oilseeds, etc.) or hay
 - Certified
 - Transitional
 - Fruits, vegetables or greenhouse products
 - Certified
 - Transitional
 - Animals or animal products (meat, dairy products, eggs, etc.)
 - Certified
 - Transitional
 - Maple products
 - Certified
 - Transitional
 - Herbs, spices or garlic
 - Certified
 - Transitional
 - Other — Specify:
 - Certified
 - Transitional

There was slightly more data on organic production in the United States. However, export codes have yet to be established to differentiate export sales of organic production from conventional production.

The second step was to begin searching information on potential markets for organic soybean production. The search for markets began close to home and moved outward - starting with Atlantic Canada, followed by other Canadian markets and United States (US) markets. The options to pursue were numerous. At this point, it was necessary to talk to the organic growers to determine the level of commitment to not only growing organic soybeans, but what volumes were achievable and what strategy did growers want to pursue in developing markets for their organic soybeans. Market development can be a long, slow process requiring a high level of commitment before seeing any returns from time, effort and dollars spent, so it was very important to get the growers' input at this stage of the project.

Two meetings were held with Prince Edward Island organic soybean growers to discuss and determine their strategic direction with regard to organic soybean production and marketing. Ten organic growers attended the first meeting and five attended the second meeting. The meetings began with three presentations to ensure that all participants were on a level playing field in their knowledge of exporting requirements, organic certification and potential markets before determining strategic direction.

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The first presentation was titled **Exporting - An Overview of What is Involved and Programs in Support of Export Development** presented by Jeff Burry, Trade and Investment Officer, Atlantic Canada Opportunities Agency. The second presentation included information on the Organic Certification requirements for different export markets and was presented by Paul Breau, Organic Inspector, Pro-Cert Organic. The third presentation by the project consultant was an overview of the marketing options available to the growers. Copies of these PowerPoint presentations are included in Appendix A.

Questions addressed in the discussions following the presentations were:

- 1) Where are we? - Strengths, Weaknesses, Opportunities, Threats (SWOT Analysis)
- 2) Where do we want to be? - What is the Vision?
- 3) How do we get from where we are to where we want to be? - Gap Analysis and Action Plan

Following the development of the Strategic Plan, the market research was completed based on the short term direction identified by the growers in their action plan.



The Strategic Plan

The strategic planning exercise began with a 'SWOT' analysis. A SWOT analysis is the identification of the strengths, weaknesses, opportunities and threats relative to the enterprise you are undertaking. Strengths can be capitalized on, weaknesses indicate where improvements are needed, opportunities can be pursued and threats are to be wary of, in working toward a vision. SWOT analysis is a very important first step in determining a vision. The results of the SWOT analysis are summarized in the table below.

SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis for PEI Organic Soybeans

<p>STRENGTHS</p> <ul style="list-style-type: none"> Government support (financial & policy). Close network with farmers and government officials Small farms - easier to cooperate. Incentive to work together. Wide range of ages & experiences Unique Island brand (isolation, clean image, Anne of Green Gables, good agronomic practices) Island shipping ports available Organic production is new, giving more flexibility for markets Established and establishing local buyers to market the crop Organic demand is growing. Potential for growth 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> Data on organic soybeans not available. Need to know market volumes and prices. Very little history to share knowledge and experience Small scale farm disadvantages (access to high speed, export knowledge and experience, higher production, equipment and freight costs, hard to supply large markets) Climate - cool and wet Decline in organic livestock industry - limits crop rotation options and decreases feed sales for #2's Organic soybean disadvantages (seed availability - less variety and low volume, no organic crop insurance program, price fluctuation and no significant premium for organic) Value added - small scale, limited processing experience and farm branding unavailable
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> European and Japan markets - improve yields and acres Expand varieties and introduce new crops (peas) Organic seed industry on PEI Livestock feed in US market Support local organic livestock market Improve and grow the oilseed value added processing Pet food industry More on farm Cost of Production knowledge Relatively inexpensive land costs Access infrastructure funding (Mar 31, 2013) 	<p>THREATS</p> <ul style="list-style-type: none"> Competitors claims - organically grown, natural, free range, IP. Consumer confusion. Food safety scares (consumer perception) Other growing areas - better growing conditions High transportation and Production challenges - weather conditions, insufficient length of rotations, weed control, transporting of GM crops (birds), limited organic land available for rent, risk for contamination with equipment sharing, labour intensive, fuel costs Livestock feed industry - small customer base which can create oversupply of soybeans if one farm drops out.

Using the results of the SWOT analysis, the growers developed a ten year vision for the organic soybean sector for Prince Edward Island.

Vision:

PEI Organic Soybean Sector in 2022

Prince Edward Island organic farmers grow 5000 acres of organic soybeans as part of a total organic crops acreage of 15-20,000 acres. There is a diversity of organic crops grown in PEI and these are supported by, and provide a source of feed to, a vibrant organic livestock industry - primarily hogs and chicken.

Organic soybeans consistently yield 1.4 metric tonnes per acre, and seed sources for all varieties are grown in PEI. There are more crop input tools available to the organic sector as a result of increased PMRA registrations. Prince Edward Island is GMO free, thus reducing the risk of contamination to organic crops.

One quarter of the PEI organic soybean crop is marketed as feed to organic livestock growers in Atlantic Canada and the New England states. Three quarters of the crop is marketed to Asian companies as food soybeans. Growth in the PEI organic soybean sector has resulted from growth of export markets. Processing and value added infrastructure has been developed to generate greater economic benefit to the sector and the province.

PEI organic farmers are profitable and represented by a diversity of age and experience. They work together to ensure market supply matches market demand, and to have a strong voice in the community and to government.

After stating the vision, the next step was to create a short term - two to three year - action plan to move towards achieving the vision. The first meeting concluded with a brainstorming session to identify several possible action items and shorter term goals for the action plan.

During the second meeting, the list of action items was fine tuned resulting in the short term goals and activities outlined in the tables on the following pages.



Goal #1: Increase organic soybean yields in Prince Edward Island to 1.4 metric tonne per acre			
Success will be measured by a consistently high level of production and increased profits.			Budget: \$33,500
Action Steps	Person(s) Responsible	Deadline	Result
In consultation with crop researchers, determine what research is to be done - what varieties, weed control, agronomic practices, use of inputs to increase yield	Organic soybean committee, Executive Director of Organic Soybean Association	Mar 1, 2012	Research protocol
Make an application for funding for designing the research trials	Joyce Kelly, Certified Organic Producers Co-operative and Susan MacKinnon, PEI Department of Agriculture	Mar 1, 2012	Application for funding is complete
Develop contract for research to be completed with researchers	Joyce Kelly, Certified Organic Producers Co-operative and Susan MacKinnon, PEI Department of Agriculture	Mar 10, 2012	Researchers have signed contract
Develop details regarding protocols for research	Researchers	Mar 31, 2012	Inputs and procedures are identified
Find farmers to participate at the farm level	Researchers	Apr 30, 2012	Plots of land are identified for trials
Conduct the research trials	Researchers	November, 2012	Plots are planted and procedures are implemented for evaluation
Evaluate the results	Researchers	December, 2012	Knowledge is obtained regarding best practices
Write the report	Researchers	February, 2013	Report is complete
Communicate the results to the growers	Researchers and Organic Soybean Committee	March, 2013	Presentation to growers
Implement agronomic practices based on research results	Farmers	2013 Crop season	Best agronomic practices are used
Measure results	Farmers	December 2013	Increased yields, quality and profit

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Goal #2: Conduct market research			
Success will be the development of diversified organic soybean markets		Budget: \$15,000	
Action Steps	Person(s) Responsible	Deadline	Result
Work co-operatively with Alex and Will Beattie	Grower group	On-going	Asian markets established for shipping PEI organic soybeans
Identify current domestic markets	Ronda Bellefontaine	Feb 29, 2012	Domestic markets identified for those growers with supply to meet those markets
Investigate Atlantic Canadian and New England organic buyers of organic soybean feed	Ronda Bellefontaine	Feb 29, 2012	Potential buyers of soybeans for livestock feed are identified
Identify government resources available for expansion of organic soybean production and development of export markets	Ronda Bellefontaine	Feb 29, 2012	Persons and organizations who can assist in export markets are identified



Goal #3: Determine cost of production for organic soybean production in Prince Edward Island*			
Success is having a benchmark cost of production for growers to measure against when evaluating their own cost of production.		Budget: Time of growers, PEI Department of Agriculture staff and Executive Director, Certified Organic Producers Co-operative	
Action Steps	Person(s) Responsible	Deadline	Result
Contact and consult with Colleen Younie in PEI Department of Agriculture with regard to calculating cost of production	Susan MacKinnon	Mar 31, 2012	Determine a course of action for calculating cost of production
Research Department of Agriculture websites in other provinces for information related to calculating costs of production, i.e., hourly rates for equipment	Susan MacKinnon/ Colleen Younie	Apr 15, 2012	Information to use in calculating local costs of production
Hold a grower meeting to discuss and calculate cost of production for growing organic soybeans in Prince Edward Island	COPC to coordinate in consultation with Drew Jeffery	Apr 30, 2012	Information is gathered to compute the cost of production
Communicate results with all growers	COPC	May 31, 2012	Growers will have a set of costs for benchmarking their individual costs of production

*A report entitled The Profitability of Organic Soybean Production by W.D. McBride and Catherine Greene, US Department of Agriculture, Economic Research Services, Washington, D.C. published in the Journal of Renewable Agriculture and Food Systems may be useful to this goal. Report is available online at: <http://ddr.nal.usda.gov/bitstream/10113/44207/1/IND44430162.pdf>

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Goal #4: Work co-operatively			
Success is a profitable organic soybean sector in Prince Edward Island		Budget: Time of growers and Executive Director, Certified Organic Producers Co-operative	
Action Steps	Person(s) Responsible	Deadline	Result
Establish a PEI organic soybean grower group	Drew Jeffery and Joyce Kelly, Certified Organic Producers Co-operative	Feb 29, 2012	Grower group is established to work co-operatively on growing the market
Working with the Executive Director of COPC organize monthly meetings to work on implementation of the Organic soybean strategic plan	Drew Jeffery	Feb 29, 2012	Achievement of goals related to implementation of Action Plan

Goal #5: Administration and coordination			
Success is having knowledge of the volume of supply in order to make better marketing decision		Budget: \$15,000 annually	
Action Steps	Person(s) Responsible	Deadline	Result
Monitor planting intentions of PEI organic soybean growers	Susan MacKinnon, PEI Department of Agriculture	Mar 31, 2012	Information to estimate total supply for the crop season
Monitor supply of PEI organic soybeans during the growing season and after harvest	Susan MacKinnon, PEI Department of Agriculture	Nov 30, 2012	Knowledge of volume of soybeans available for market
Find/Design a mechanism to monitor markets on an ongoing basis	Ronda Bellefontaine	Mar 31, 2012	List of market data sources used to monitor soybean markets
Prepare a list of livestock feed available - growers' names and contact information and types of feed available	Joyce Kelly, Certified Organic Producers Co-operative	Annually	Sales information used to make better marketing decisions
Have a voice through Certified Organic Producers Cooperative to lobby government on funding, policy, GMO status, and other issues relevant to organic soybean growers	Organic soybean grower group	Annually	Policies benefitting organic soybean production



Research Results

Soybean Production Statistics

In the 2001 Census of Agriculture, there were 246,923 total farms reporting. Of these, 2,230 reported the production of certified organic products and 1,442 of them reported growing organic field crops.

In the 2006 Census of Agriculture, 3,555 reported growing certified organic products. Of these, 2,462 growers reported growing organic hay or field crops. There were 229,373 farms reporting in total.

The 2011 Census results were not available at the time of writing of this report.

In the 'Frequently Asked Questions' section of the Canadian Soybean Council website (www.soybeancouncil.ca), it was noted that "According to industry sources, organic soybean production and trade is relatively stable. Organic soybeans are estimated to represent less than 1 percent of Canada's total soybean production. According to recent estimates, 26,982 acres of organic soybeans were grown in Canada in 2008. By province, that would amount to:

Ontario – 17,896 acres

Quebec – 8,233 acres

PEI – 773 acres

Manitoba – 80 acres

Organic production of soybeans is considered a niche opportunity for Canadian soybean growers and will likely remain this way in the short-term. Organic production is a more intensive production system that requires more mechanical weed control and diverse crop rotation."

Agriculture and AgriFood Canada prepared a report entitled **Certified Organic Production in Canada 2008**. The data presented in this report was collected from the organic certification bodies (CBs) that were known to be operating in Canada. It was noted in the report that "compiling organic production statistics continues to be a challenge for some CBs and a few choose not to provide the detailed information requested." The organic soybean acreages reported above on the Canadian Soybean Council website were taken from this report.

In 2010, Prince Edward Island farmers known or suspected to be growing organic soybeans were surveyed. Fourteen farms in total were surveyed and there were twelve responses. A total of 1,687 acres were reported in organic soybean production with an average price received of \$623 per metric tonne (MT). Reported freight costs ranged from \$55 to \$75 per MT.

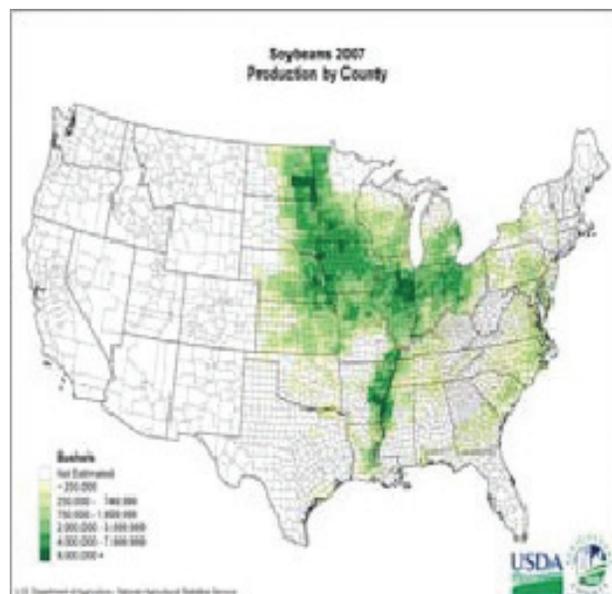
In the United States, certified organic acreages are being reported by the Economic Research Service for the United States Department of Agriculture. The acreages listed below were taken from Table 7 of the website <http://www.ers.usda.gov/data/organic/#national>. It is interesting to note that organic soybean acreage peaked in 2001 and has leveled off at approximately 125,000 acres per year. Historically, organic soybean acreages measure a fraction of 1% of total soybean acreages grown in the US.

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Certified organic soybean acreages in the United States

Year	Acres
1997	82,143
2000	136,071
2001	174,467
2002	126,540
2003	122,403
2004	114,239
2005	122,217
2006	114,581
2007	100,390
2008	125,621

The following diagram illustrates where soybean production is located in the United States. It is assumed that organic soybean production is distributed amongst the same areas as conventional soybean production.





The diagram was taken from a presentation made by Ron Moore, American Soybean Association to the European Feed Manufacturer's Association annual congress in June, 2010 at Hamburg, Germany.

Source: www.fefaccongress2010.eu/fileadmin/FEFAC/Presentations/FEFAC_Congress_III_05_Ron_Moore.pdf

An organic soy profile report from the Agricultural Marketing Resource Centre (AgMRC) at Iowa State University prepared by Roy Hansen, revised in May 2011, compared American and Canadian production. "In 2008 organic soybeans were produced on 125,621 acres. Minnesota reported the largest number of acres planted to certified organic soybeans that year: 21,229. That same year, Iowa had 19,913 acres planted in organic soybeans, and Michigan had 11,251 acres. In comparison, Canadian producers planted organic soybeans on 26,982 acres in 2008."

According to the Food and Agriculture Organization of the United Nations Statistical Tables (FAOSTAT), in 2010, the top 10 producing soybean countries were:

- 1) United States
- 2) Brazil
- 3) Argentina
- 4) China
- 5) India
- 6) Paraguay
- 7) Canada
- 8) Uruguay
- 9) Bolivia
- 10) Indonesia

The report did not differentiate between organic and conventional soybean production.

The following paragraph is from an organic soy profile, revised in May 2011 on the AgMRC - Agricultural Marketing Resource Centre web site. The entire profile can be found at:

[systems.http://www.agmrc.org/commodities__products/grains__oilseeds/soy/organic_soy.cfm](http://www.agmrc.org/commodities__products/grains__oilseeds/soy/organic_soy.cfm)

"The United States does not have consistent data on organic trade. Organic product codes have not yet been added for organic soybeans. USDA's Foreign Agricultural Service estimates that the value of U.S. organic exports was \$125 to \$250 million in 2002. Canada is the largest market for U.S. organic exports, and industry data suggests that the value of organic food exported to Canada was between \$75 million and \$150 million. Organic soybeans are a major organic export."

Price Reports

With regard to pricing, a new report by the USDA as of January 1, 2012 reports National Organic Grain and Feedstuffs biweekly on Thursdays. Prices are reported for food grade, feed grade, meal and roasted organic soybeans as well as crude and refined organic soybean oil. Previous to January 1, there was the Eastern Cornbelt Organic Grain & Feedstuffs Report (Bi-Weekly) which was a weighted average report for the following states: IL, IN, OH, MI, PA, NC, NY, and the Upper Midwest Organic Grain & Feedstuffs Report (Bi-Weekly) - a weighted average report for states including: WI, MN, IA, SD, ND, NE, KS, MO. This price report is found at: <http://www.ams.usda.gov/mnreports/lbfnof.pdf>

There is an Organic Price Report found on the Rodale Institute website at: <http://rodaleinstitute.org/Organic-Price-Report>. Choose one product|all markets and then choose the Product as either Soybeans: Feed Stock or Soybeans: Tofu type.

Lastly, a link to Buy and Sell prices is found on the website for Homestead Organics, a Canadian company working to develop organic agriculture. Go to the following link for current price quotes: <http://www.homesteadorganics.ca/Buy-and-Sell-Grain.aspx>

Market Reports

Although there are a number of reports available on conventional grains and oilseeds, there are none found on organic grains and oilseeds. Two market reports on conventional grains and oilseeds published by Agriculture and AgriFood Canada are the Canada: Grains and Oilseeds Outlook found at: http://www.agr.gc.ca/pol/mad-dam/index_e.php?s1=pubs&s2=go-co&s3=php&page=go-co_2012-02-1

and the Weekly Price Summary of Canadian Crops found at: http://www.agr.gc.ca/pol/mad-dam/index_e.php?s1=pubs&s2=pri

Market information is also available on the Wehrmann Grains and Oilseeds site at: <http://www.wehrmanngrainandseed.ca/product.html>



Market Research

Local Markets

PEI is the only Atlantic province growing organic soybeans. For local markets, its competitors are growers in Ontario and Quebec. For other markets, competition is all organic soybean growing regions of the world. Local markets are smaller, niche markets which are currently being served mostly by local production. These markets include:

- Acadiana Soy Products, located in Grand Pre, Nova Scotia has been making tofu since 1994. The website for this company notes that the soybeans are grown on Prince Edward Island. Contact information: Acadiana Soy Products, P.O. Box 34, Grand Pré, Nova Scotia B0P 1M0; Phone: 902 542-0675; Fax: 902 542-1297; Email: anna@acadianasoy.ca
- Alpha Mills, located in Heatherdale, PEI is owned and operated by Alex and Will Beattie. The Beatties are currently involved in developing markets for organic soybeans and grains, including working with the Taiwanese Order of Monks in Montague to export their organic soybeans. At the time of writing this report, they were in the market investigation and testing stage having just attended a European food show. Contact information: Alpha Mills, 2175 Comptons Road, RR 1 Heatherdale, PE C0A 1R0; Phone: (902)838-3600; Email: info@alphamillsinc.com
- Atlantic Soy Corp located in Belle River, PEI is processing Identity Preserved (IP) soybeans through its plant. The owner will consider organic certification of the plant if there was a minimum supply of 5000 acres of organic soybeans. Contact: (902)962-3596; Email: irene.kilbride@pei.sympatico.ca or atlanticsoy@bellaliant.com
- Barnyard Organics, located in North Freetown, PEI and owned and operated by Mark and Sally Bernard sources organic soybeans for local organic livestock producers. Contact: Mark & Sally Bernard, 1494 Cairns Rd, Freetown, PE C0B 1L0; Home: 902 887-3188; Cell: 902 439 1182; e-mail: info@barnyardorganics.ca
- Co-op Atlantic currently buys roasted soybeans from Prince Edward Island and would like to buy soymeal. They are currently using about 2 tonne per month in their own feed and have an option to broker beans to Quebec, as Quebec is always looking for organic soybeans. NB Seed, a seed handling facility in New Brunswick is currently certified organic. They can grade and process certified organic seed. Contact: Shaunda Babineau, Co-op Atlantic, 506-858-6178, PO Box 750, 123 Halifax Street, Moncton, NB E1C 8N5
- Natures Crop International (NCI) is located in Kensington, PEI and would process seconds and smalls for soybean oil. The challenge for NCI is to find markets for the soybean meal byproduct from the oil pressing process, which it would need to sell at competitive prices. Contact: Nature's Crops International, P.O. Box 248, 12682 Margate Road (Route 6), Kensington, PE C0B 1M0; Phone: (902)836-3332; Fax: (902)836-4506; Email: steve@nci.com

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- Speerville Mills is located in Speerville, New Brunswick primarily grinding organic grains and oilseeds for flour and other products. Their catalogue states that they continue to find markets for locally grown grain. In a telephone conversation, they stated that their demand for organic soybeans is approximately 2 tonne per year which is sourced from a Prince Edward Island grower. He noted that demand for soy flour has decreased in recent years. Contact information: Speerville Flour Mill, 152 Speerville Road, Speerville, NB E7N 1S2; Toll Free Phone: 866-277-6371; Phone: 506-277-6371; Fax: 506-277-1006; Email: speerville@xplornet.com
- Organic dairy producers in Nova Scotia will launch their organic milk in June, 2012. Current demand would approximate 100 - 120 tonnes per year. If the organic milk launch goes well, there is the potential for expansion of the organic dairy sector in Nova Scotia and, therefore, potential increased demand for feed soybeans. Contact: Mike Main, M.Sc., Organic Dairy Extension and Research Specialist, Organic Meadows and OACC, NSAC, P.O. Box 550, Truro, NS B2N 5E3; Phone: (902) 896-2467; Fax: (902) 896-7095; E-mail: mmain@nsac.ca
- Direct marketing of soya beans or soya products to the end consumer - not generating any large demand for raw beans.

New England Livestock Feed Market

Telephone enquiries were made in the New England states, and an internet search conducted, to determine the potential market for organic soybeans for the livestock feed market. It was suggested that direct contact be made with organic dairy producers in the region. Contact the Northeast Organic Dairy Producers Alliance (NODPA) via their website at <http://www.nodpa.com/index.shtml> for more information.

It was noted that the NODPA has an annual field day which will be held September 27 and 28, 2012 in Brattleboro, Vermont. A visit to this field day would be a good first step in determining if a market exists here for PEI organic soybeans and to establish a relationship with these organic dairy farmers.

Another source to contact is the Small Farms Program at Cornell University which provides extension information to small and organic dairy farmers in upstate New York. Their website is found at <http://smallfarms.cornell.edu/>

The National Sustainable Agriculture Information Service has a listing of Organic Livestock feed suppliers in Canada and the US. You can make a submission online to be added to the list. The listing is found at https://attra.ncat.org/attra-pub/livestock_feed/

There is also an organic dairy farmer co-operative called the Maine Organic Milling Co-operative which sources organic feeds. Their web address is <http://www.maineorganicmilling.com/> or they can be contacted at (207) 346-6371.



Domestic Organic Soybean Buyers Outside of Atlantic Canada

The organic soybean growers are familiar with the following three buyers of organic and IP (identity preserved) grains and oilseeds. Their names and contact information are included here for reference.

- Homestead Organics
www.homesteadorganics.ca
Tom Manley, Owner and president, general manager, grain purchases & sales
tom@homesteadorganics.ca
1 Union Street, PO Box 39, Berwick, Ontario, K0C 1G0
Tel: (613) 984-0480, Extension 225
Toll Free: 1-877-984-0480
Fax: (613) 984-0481
- Hendrick Seeds Inc.
www.hendrickseeds.com
David Hendrick, President
DavidH@hendrickseeds.com
11451 Cameron Rd, Inkerman, ON K0E 1J0
Office: (613) 989-5400
Plant: (613) 989-2054
- Wehrmann Farms LTD.
www.wehrmanngrainandseed.ca
Harro Wehrmann, President
ingasven@hurontel.on.ca
460 Sideroad 20, RR 1 Ripley, ON N0G 2R0
Office: 519-395-3126
Fax: 519-395-2935
Cell: 519-955-0386

There is a list of Quebec field crop buyers (organic and conventional) on the website of La Fédération des producteurs de cultures commerciales du Québec. The following url is a direct link to the lists of buyers - <http://www.fpccq.qc.ca/Marches/acheteurs.aspx>. However, it does not appear that there are any buyers of organic soybeans for 2012.

Soy Food Processors - Canada and the US

Although the strategic plan does not involve targeting Canadian organic soy food processors beyond the Atlantic region, or US organic soy food processors, a small amount of information on both is included below. Four Canadian processors were identified with three of them located on the west coast and the fourth one in Quebec. These companies are:

- Earth's Own (formerly SoyaWorld Inc.)
www.earthsown.com
consumer@earthsown.com
1-888-401-0019
Earth's Own Food Company Inc.
P.O. Box 3018, Vancouver, BC V6B 3X5
- Sunrise Soya Foods
www.sunrise-soya.com/about
sales@sunrise-soya.com
1.800.661.BEAN (2326)
Head Office - 729 Powell Street, Vancouver, BC V6A 1H5
Toronto Office - 21 Medulla Avenue, Toronto, ON M8Z 5L6
- Green Cuisine
www.greencuisine.com
andy@greencuisine.com
250-385-1809
#5 - 560 Johnson St., Market Square, Victoria, BC
- UniSoya (1986)
www.unisoya.com/en/
Mr. Real Beaulieu, VP Finances or Mr. Gilles Ranger, Sales Manager.
185 rue Boyer, St-Isidore-de-Laprairie, Québec J0L 2A0
Phone: 450 454-5123
Fax: 450 454-5221

There are a greater number of soy food processing companies in the United States. Many of these companies are located in the mid-west or on the west coast. Two internet sources are used to identify some of these companies. The sources are the Soyfood Association of North America (SANA) and the Cornucopia Institute. It is assumed that SANA represents the larger players in the market and the Cornucopia Institute - the smaller players.



Links to the lists of companies are provided below:

Soyfoods Association of North America:

<http://www.soyfoods.org/soy-products/find-a-product-supplier-or-distributor/company-contacts>

Cornucopia Institute:

<http://www.cornucopia.org/soysurvey/>

Resources for Export Market Development

Based on the Strategic Plan, the organic soybean growers will focus on filling Atlantic Canadian markets and nearby US markets before looking to go further to markets in Europe and Asia. At the same time, Will Beattie and Alex Beattie of Alpha Mills Natural Products in Heatherdale are investigating international markets. In February 2012, they attended a trade show in Europe and are working with a local buyer on potential exports to Taiwan. To avoid duplication of effort, the growers will work with the Beatties in identifying, and growing for, these export markets.

A number of resources are available for growers who are interested in developing export markets. Agriculture and Agri-Food Canada (AAFC) and the Department of Foreign and International Trade (DFAIT) work co-operatively to assist Canadians interested in pursuing food export markets. The AgriFood Trade Service (<http://www.ats-sea.agr.gc.ca/intro/index-eng.htm>) is a division of Agriculture and Agri-Food Canada with a focus on food export. The regional contact for making a global enquiry from PEI is Diane Farquharson located in the Charlottetown office. Ms. Farquharson can be contacted by email at diane.farquharson@agr.gc.ca or by phone at 902-566-7307. The local contact for enquiries related to Grains and Oilseeds or Organics is Rose Halliday. Ms. Halliday can be contacted by email at rose.halliday@agr.gc.ca or by phone at 902-566-7304. General enquiries can be made at the office located at 3rd Floor, 440 University Avenue, Charlottetown, Prince Edward Island, C1E 1E3 or (902) 566-7290.

The ATS (AgriFood Trade Service) Bulletin is a monthly snapshot of International Events, Trade Reports, Canadian Events and News related to the Export of Canadian Food Products. It is available on the Agriculture and AgriFood Canada website by clicking the link for the ATS Bulletin on the webpage at the following address: <http://www.ats-sea.agr.gc.ca/reg/atl-eng.htm>.

Also listed on the web page <http://www.ats-sea.agr.gc.ca/reg/atl-eng.htm>, you will find contact information and links to other sources of assistance when exporting or developing export markets. The following information is taken directly from their website:

Canadian Food Inspection Agency Regional Offices
Prince Edward Island
690 University Ave
Charlottetown, Prince Edward Island
C1E 1E3
Tel: (902) 566-7290
Fax: (902) 566-7334

Prince Edward Island *Organic Soybean Market Study and Strategic Plan*

Canada Business

www.canadabusiness.ca

Our goal is to provide your business with the resources it needs to grow and prosper, including a wide range of information on government services, programs and regulations. Canada Business promotes entrepreneurship and innovation, and provides assistance through an organized network of service centres across Canada. There is a centre in each province and territory working with partners in many communities across their region, providing you with numerous service access points.

Atlantic Canada Opportunities Agency

www.acoa-apeca.gc.ca

The Atlantic Canada Opportunities Agency works with business and communities to make Atlantic Canada's economy more innovative, productive and competitive. Together, with Atlantic Canadians, we are building a stronger economy.

International Trade Centres

www.tradecommissioner.gc.ca

Located in every province, International Trade Centres provide a full range of trade development services and assistance to Canadian SMEs, including:

- Export counselling and market entry support
- Information on international markets
- Pathfinding for export programs and services
- Recruitment of participants for trade fairs and missions abroad
- Recommendations for trade-related conferences and seminars
- Trade publications produced by Team Canada Inc and others

Trade Team Prince Edward Island

www.tradeteampei.com

Other

Future Considerations - Years 4 to 10

This report focuses on a three year plan of action to achieve the stated vision of the organic soybean growers. It is important that this plan be reviewed on an annual basis and, as one year is completed, to add another year or two of action items to keep moving toward the vision for 2022. Depending on your results, you may want to revise the current vision or create a new one, once the current vision is achieved.

Considerations for future action plans may involve such things as growing of non-GM or identity preserved (IP)* or some other crop; participating in outgoing and incoming trade missions; joining regional or national organizations; developing a storage facility; working on transportation issues; developing markets further abroad; product development; or processing facilities.

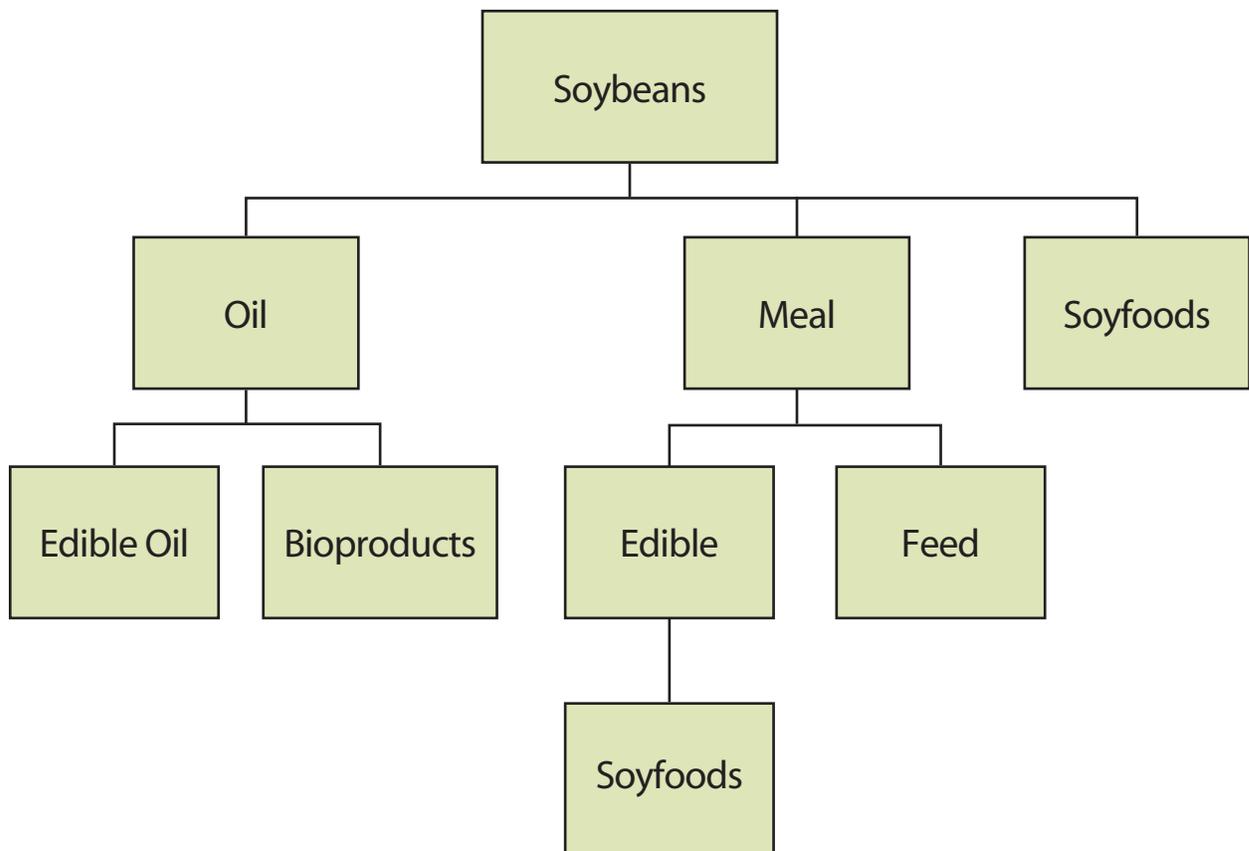
*IP - Operated under the leadership of the Canadian Grain Commission, the Canadian Identity Preserved Recognition System (CIPRS) is strengthened with independent third part audits and certification. Reference: <http://www.canadiansoybeans.com/content.php?id=12>



Soy Products and Uses

The information in this section is included for informational purposes. The following diagram was recreated based on a diagram from a PowerPoint presentation entitled **Soybean Crops in Canada: A case study on Sustainability in Agricultural Systems**. It was presented by Dale Petrie, General Manager, Ontario Soybean Growers (OSG). The complete presentation is found at: http://www.cielap.org/pdf/Soybeans_Petrie.pdf

101+ Uses for Soybeans Food and Feed and Fuel



The following two pages are taken from the Soy 20/20 website and include comprehensive lists of food products and industrial products using soybeans.

Soy Products and Uses

Food

Whole Bean

fresh green soybeans
baked soybeans
bean sprouts
soy coffee
roasted soybeans
soymilk
soysauce
tofu
miso
natto
tempeh
other Asian soyfoods
edamame

Full Fat Flour

bread
candy
doughnut mix
frozen desserts
pancake flour
pie crusts
sweet goods
low-cost Gruels
instant milk drinks
crackers

Refined Oil (18%*)

cooking oils
salad oils
mayonnaise
medicinals
pharmaceuticals
sandwich spreads
shortenings
filled milks
coffee whiteners
candy
chocolate coatings
frying oils
frozen desserts
cheese dips
gravy mixes
pastry fillings
icings
whipped toppings

Protein Products (38%*) Soy Flour, Protein Concentrates and Isolates

bakery ingredients
alimentary pastes
beer and ales
noodles
prepared meat products
meat analogs
meat pumping solutions
breakfast cereals
prepared mixes
food drinks
baby foods
hypo-allergenic foods
candy products
sausage casings
yeast cultures
imitation dairy products
flavorings
infant formula
salad condiments

Lecithin (0.5%*)

cooking oils
salad oils
mayonnaise
medicinals
pharmaceuticals
sandwich spreads
shortenings
filled milks
coffee whiteners
candy
chocolate coatings
frying oils
frozen desserts
cheese dips
gravy mixes
pastry fillings
icings
whipped toppings

Sterols (minor*)

pharmaceuticals

Tocopherols (minor*)

vitamin E
antioxidants

Nutraceuticals - Pharmaceutical / Health

isoflavones
saponins
phytic acid
protease inhibitors

Hull Products / Fibre (8%*)

fibre



* percent composition of whole soybean

Funding for Soy 20/20 is provided by Ontario Soybean Growers, University of Guelph and by Agriculture and Agri-Food Canada and Ontario Ministry of Agriculture, Food and Rural Affairs under the Agricultural Policy Framework, an agreement among federal, provincial and territorial governments to make Canada's agri-food sector a world leader in science and innovation.

www.soy2020.ca

Soy Products and Uses

Industrial

Protein Products (38%*) Soy Flour, Protein Concentrates and Isolates

adhesives
plywood
wallboard
particle board
insecticides
dry-wall tape compound
textured paints
fermentation nutrients
yeast carriers
linoleum backing
antibiotics
paper coatings
fire-fighting foams
fire-resistant coatings
asphalt emulsions
cleaning compounds
cosmetics
printing inks
leather substitutes
water-based paints
plastics
textiles

Glycerol (minor*)

chemicals
lubricants
structured lipids
antifreeze
printing acids
cements
explosives
cosmetics

Lecithin (0.5%*)

anti-foam agents
anti-spattering agents
cosmetics
dispersion agents
printing inks
insecticides
paints
synthetic rubbers
stabilizing agents
wetting agents
yeast

Refined Oil (18%*)

anti-corrosion agents
anti-static agents
caulking compounds
soap
shampoo
detergents
solvents
lubricants
core oils
lubricants
biodiesel
hydraulic fluids
waterproof cement
disinfectants
electrical insulations
pesticides
linoleum backing
oiled fabrics
candles
cosmetics
crayons
printing inks
protective coatings
plastics
wallboard
dust suppressants
paint removers
epoxys
metal casting agents
paints



Fatty Acids (minor*)

soaps
detergents
oleochemicals
structured lipids

Hull Products / Fibre (8%*)

filter material
peroxidase

* percent composition of whole soybean

Funding for Soy 20/20 is provided by Ontario Soybean Growers, University of Guelph and by Agriculture and Agri-Food Canada and Ontario Ministry of Agriculture, Food and Rural Affairs under the Agricultural Policy Framework, an agreement among federal, provincial and territorial governments to make Canada's agri-food sector a world leader in science and innovation.

www.soy2020.ca

Soybean and Other Oilseed Organizations

There are a number of soybean organizations in Canada and the United States that are worth referencing for future use. They are listed below. Many of these organizations are also included in the Oilseed Industry Directory found at the Agriculture and Agri-Food Canada web page - <http://www.ats-sea.agr.gc.ca/pro/4218-eng.htm#6>.

- Soy 20/20 - www.soy2020.ca
- Canadian Soybean Council (CSC) - www.soybeancouncil.ca (Canadian Soybean Dispatch publication, current statistics on Canadian soybean production, frequently asked questions)
- Soyfoods Canada - www.soyfoodscanada.com (Soyfoods promotional website)
- Grain Farmers of Ontario (GFO) - www.gfo.ca
- Manitoba Pulse Growers Association (MPGA) - www.manitobapulse.ca
- Fédération des producteurs de cultures commerciales du Québec (FPCCQ) - www.fpccq.qc.ca
- Canadian Soybean Exporters' Association (CSEA) - www.canadiansoybeans.com
- Canadian Oilseed Processors Association (COPA) - www.copaonline.net
- Vegetable Oil Industry of Canada (VOIC) - www.voic.ca
- Canadian International Grains Institute (CIGI) - www.cigi.ca
- Canadian Grain Commission (CGC) - www.grainscanada.gc.ca
- University of Guelph - www.uoguelph.ca
- Agriculture and Agri-Food Canada - www.agr.gc.ca
- Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) - www.omafra.gov.on.ca
- Beyond the Bean/United Soybean - www.unitedsoybean.org
- Mid-Atlantic Soy - www.midatlanticsoy.org
- Soyfoods Association of North America (SANA) - www.soyfoods.org
- Soybeans Premium.ORG - www.soybeanpremiums.org
- Canadian Soybean Exporters' Association:
<http://www.canadiansoybeans.com/content.php?id=4>



An excerpt from "US Soybean Production: A Comparison of Sustainable Production Systems for Conventional, Biotech and Organic Soybeans"

The Organic System

In 2005, there were 122,217 certified organic soybean acres in the U.S., which comprised 0.17 percent of the total soybean acres. Almost half of these organic acres were in Iowa, Michigan and Minnesota. In order to sell certified organic soybeans, producers must be certified by the U.S. Department of Agriculture-Agricultural Marketing Service's National Organic Program.

Requirements to be certified as an organic soybean producer include:

1. No synthetic fertilizers or pesticides for at least the previous 3 years,
2. An approved, planned sequence of crops in each identified field,
3. Use of organically produced seed, and
4. Complete records of inputs and operations.

Organic producers may not utilize biotechnology. Disease and pest management relies on varietal resistance and crop rotation. Tillage is used for cover crop management and weed control, and this may increase erosion potential. Where mechanical weed control is not effective, hand weeding is necessary. Crop rotation and rotation sequence are fundamental to managing weeds, insects, diseases and fertility, as is using animal manures and legume cover crops as fertilizer sources.

An extensive survey of Midwestern U.S. commercial soybean farmers compared the economics and practices of conventional and organic soybean production. The following key points are pertinent to U.S. organic soybean production:

1. Organic soybeans are produced on smaller farm operations (averaging 478 acres) than non-organic soybean (averaging 748 acres).
2. Significant labor requirements associated with organic soybean production make organic production less practical on larger farms (labor cost of \$16.89/acre for non-organic vs. \$54.33/acre for organic).
3. Organic soybean operations substitute field operations for chemicals and incur higher fuel, repair and hired labor costs.
4. Organic soybean producers obtain an average yield of 31 bushels/acre compared with 47 bushels/acre for conventional producers.
5. The market premium for organic soybeans is \$9 bushel compared to other production systems.

Appendix A

Presentations to Strategic Planning Meetings

The presentations on the following pages were made to the organic producers on Day 1 of the strategic planning meetings. The first presentation was an overview of export development and the resources available to assist companies in this process. The second presentation reviewed organic certification requirements for export to various countries and regions of the world. The third presentation was an overview of market opportunities for PEI organic soybeans.



Organic Soy Producers Network

A Quick Chat About “Exporting”

“We’re from the Government.....
and we’re here to help.....!”

Jeff Burry
Jeff.Burry@acoa-apeca.gc.ca
ACOA PEI

Lee Brammer
lbrammer@gov.pe.ca
Innovation PEI

An Opening Thought

“The fishermen know that the sea is dangerous and the storm terrible, but they have never found these dangers sufficient reason for remaining ashore.”

Van Gogh

The Business of Exporting....

- Is Custom to You.....
- Requires a Commitment.....
- Represents a Process.....
- Involves Risks-Rewards.....

Research & Planning Necessary & Never Ending...

- Assessing current knowledge, resources (gaps) & changes required...

- Expectations
- Human Resources
- Financial & Legal
- Competitiveness
- Customer Profile
- Marketing & Sales
- Product Modification
- Transportation/Logistics
- Laws, Regulations & Permits
- Exporting Services
- Local Representation
- Capacity

ACOA PEI & Innovation PEI “TRADE TEAM PEI”

Activities, Events and Programs

- Outbound, Multi-Sector or Sector Specific Trade Missions
- Inbound Sector Specific Trade Missions
- Sector Specific Trade Shows
- Market Information Sessions & Special Topic Workshops
- Export Help! Program (market research/planning)
 - ✦ (Handout)
- Export Internship (business graduate recruitment)

Visit: www.tradeteampe.com

Also Check Out....

Government of Canada websites....

www.gc.ca
www.dfait-maeci.gc.ca
www.cbsa-asfc.gc.ca
www.edc.ca
www.acoa-apeca.gc.ca

Government of PEI websites....

www.innovationpei.com

Two Parting Thoughts

““Great minds have purposes,
others have wishes.”

Washington Irving

“The secret to success is
constancy of purpose.”

Benjamin Disraeli




Organic Certification

Paul Breau
 Organic Inspector
 Eastern Branch Office

Organic Certification

- Who is Pro-Cert?
- Accreditation and Organic Standards
- Organic Certification
- Export and Trade Arrangements




Who is Pro-Cert?

- Pro-Cert is the most important Canadian Certifier with over 1700 certified clients (producers and processors) in Canada and the United-States.
- Pro-Cert is owned by Wallace Hamm, from Saskatoon, Saskatchewan, an organic producer of crops such as wheat, lentils, oats and flax.
- Pro-Cert operates out of two offices: Head Office in Saskatoon, Saskatchewan and an Eastern Branch Office in Cambray, Ontario.
- Pro-Cert is celebrating 21 years of Organic Certification.




Accreditation and Standards

Pro-Cert is Accredited for the certification of the following Standards and Regulations:

- the Canadian Organic Regime (COR);
- the European Regulations (EC Regulation 834/07 and 889/08);
- the USDA National Organic Program;
- The Quebec Organic Food Control System;
- MAFF (Japan, JAS) Regulations.




Accreditation and Standards

Pro-Cert Organic Certification programs provides access to all markets worldwide:

- Provides assistance with Bio Suisse Certification (Switzerland);
- Provides assistance with export documentation to European Countries;
- Provides assistance with Brazilian Organic Certification (IBD).
- Provides Assistance with export to Taiwan.




Organic Certification

- General Process for certification:
 - Submit application (Organic System Plan)
 - Preliminary evaluation
 - Inspection
 - Evaluation
 - Certification Decision
 - Surveillance




Organic Certification

- Pro-Cert provides applicants with all the forms required to collect and record the data required for certification.
- Certified producers and processors are subject to at least one yearly inspection.
- Certifiers must conduct surveillance inspections on at least 3% of producers and 5% of processors.




Organic Certification

- Pro-Cert certification fees are determined according to our published fee schedule.
- Pro-Cert certification fees are determined by the acreage and /or number of livestock in your operation.
- Pro-Cert does not collect royalty fees or any hidden fees.






Export and Trade Arrangements

- Canadian Organic Producers will be able to export to most markets with their Canadian Organic Certificates;
- You will require additional certification for export to Japan, Switzerland and Brazil;
- Requirement for exports per country are listed on the following slides:



Export and Trade Arrangements

United-States and/or NOP:

- Organic products certified in Canada may be exported to the United-States or countries requiring NOP certification under the Canada-US Equivalency Arrangement;

Documents Required:

- COR certificate stating compliance to the Canada-US Equivalency Arrangement;

Restrictions:

- Animal products from animals treated with antibiotics are not permitted (i.e. dairy products).



Export and Trade Arrangements

European Union:

- Organic products made with ingredients grown in Canada may be exported to the European Union under the Canada-EU Equivalency Arrangement;

Documents Required:

- COR certificate and a "Certificate of Inspection for Import of products from Organic product into the European Community (or Certificate of Inspection)";

Restrictions:

- Only crops grown in Canada may be exported under this arrangement.



Export and Trade Arrangements

Taiwan:

- Organic products certified in Canada may be exported to Taiwan under the Canada-Taiwan Export Arrangement;

Documents Required:

- COR certificate and Verification of Organic Status (VOS) document issued by the certifier (also known as the Transaction Certificate);

Restrictions:

- None.



Export and Trade Arrangements

Japan:

- Organic products certified in Canada may only be exported to Japan if certified to the Japanese Agricultural Standards;

Documents Required:

- Certificate of compliance to JAS. Applicant must complete a separate application, fees and inspection;

Restrictions:

- JAS standards are similar to Canadian Standards. JAS has specific requirements for paper work such as grading and labeling of organic lots when sold.



Export and Trade Arrangements

Switzerland (Bio-Suisse):

- Organic products certified in Canada may only be exported to Switzerland if certified to Bio-Suisse;

Documents Required:

- Certificate of compliance to Bio-Suisse. Applicant must complete a separate application, fees and inspection. Certificates are issued directly by the Swiss Authorities (not the certifier). Swiss import authorizations must be completed by the certifying body;

Restrictions:

- Bio-Suisse have special requirements identified in their standards.



Export and Trade Arrangements

Brazil:

- Organic products certified in Canada may only be exported to Brazil if certified to the Brazilian Organic Standards;

Documents Required:

- Certificate of compliance to Brazilian Organic Standards. Applicant must complete a separate application, fees and inspection. Certificates are issued by IBD, a certifier located in Brazil. Pro-Cert conducts only the inspection;

Restrictions:

- The Brazilian Organic Standards has special requirements identified in their standards.



Organic Certification

QUESTIONS?

For Questions about Organic Certification, please contact Dave Lockman, Certification Manager at 1-877-574-5604 or email at dave.lockman@pro-cert.org

www.pro-cert.org

Organic Soybean Market Opportunities

January 20, 2012
Ronda Bellefontaine, P.Ag.



PEI Organic Soybean Industry

2010

- 14 farms surveyed with 12 responses
- 1687 acres
- Average price \$623/T
- Freight costs ranging from \$55/T to \$75/tonne



Competition

- Ontario
- Quebec
- US
- Other imports



Potential markets - local

- Acadiana Soy (NS)
- Alpha Mills (PEI)
- Atlantic Soy Corp (PEI and ON)
- Barnyard Organics (PEI)
- Co-op Atlantic (?) (Atl)
- Natures Crop International (NCI) (PEI)
- Speerville Mills (NB)
- Direct Marketing



Potential markets – other domestic

- Ontario
- Quebec
- British Columbia



Potential Markets - export

- United States
- European Union
- Asian



PEI Organic Soybean Industry

Where are we?

- Strengths
- Weaknesses
- Opportunities
- Threats





PEI Organic Soybean Industry

Where do we want to be?

- 10 years
- 5 years



PEI Organic Soybean Industry

Action Plan - How do we get from where we are to where we want to be?

- Year 1
- Year 2
- Year 3



Next Steps

Thank you



