

CONSULTATIONS REPORT

What We've Heard

The Next Policy Framework for Agriculture (2018-2023)

June, 2017



CANADA
Agriculture and
Fisheries



PEI Department of
Agriculture and Fisheries:

The Next Policy Framework
for Agriculture (2018-2023)

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Message from the Minister

Agriculture on PEI continues to be supported through federal, provincial, and territorial (FPT) cooperation. FPT governments continue to work closely with clients and industry stakeholders to develop policies and programs to support the agriculture industry on PEI. Together, FPT governments, clients, and stakeholders can ensure that the next policy framework (2018-2023) is prepared to support industry in its ability to remain innovative, competitive, and to address emergent challenges and opportunities.



As the Minister responsible for agriculture on PEI, I have been mandated to encourage the active participation of producers and processors of primary resources in order to develop and evaluate the Department's policies and programs. I am thankful for the feedback we have received so far. I would like to encourage those who have not yet provided their feedback to email agr-feedback@gov.pe.ca.

I look forward to continuing to work with the agriculture sector as we move closer to the next policy framework.

Sincerely,

A handwritten signature in black ink that reads "Alan McIsaac". The signature is fluid and cursive, with a long horizontal stroke extending to the left.

Alan McIsaac
Minister of Agriculture and Fisheries
Prince Edward Island, Canada

Message from the Deputy Minister

Throughout 2015 to 2017, staff at the PEI Department of Agriculture and Fisheries (PEI DAF) have been engaged with clients and industry stakeholders in order to collect feedback on existing Growing Forward 2 programs, and to identify opportunities for the next agriculture policy framework (NPF). The NPF will continue to focus on Markets and Trade; Science, Research, and Innovation; Value-Added Agriculture and Agri-Food Processing; and Risk Management. From the feedback received from stakeholders across Canada two additional policy objectives have been added to the NPF: Environmental Sustainability & Climate Change as well as Public Trust.



At the PEI DAF, the administration of programs under the NPF will be informed by the evaluation of the Department's current programs, meetings with stakeholders, the stakeholder engagement session held on December 01, 2016, in Charlottetown, and the feedback we have received through our online public survey in English and French.

I would like to thank those who have already provided their feedback to the Department. It is through this type of engagement that the Department can ensure that its policies and programs are responsive to the needs of the agriculture sector on PEI.

Sincerely,

A handwritten signature in cursive script that reads "Jamieson". The signature is written in a dark ink and is positioned above the printed name.

John Jamieson
Deputy Minister of Agriculture and Fisheries
Prince Edward Island, Canada

Executive Summary

This report summarizes what the PEI Department of Agriculture and Fisheries (PEI DAF) has heard so far during its consultations with clients and stakeholders. Information was collected from an evaluation of the Department's Growing Forward 2 (GF2) programs, meetings with stakeholders, an industry engagement session on December 1, 2016, and an online public feedback survey (English/French).

Collectively this information will help the Department plan for the next policy framework (2018-2023).

Next Policy Framework¹

To support the agriculture sector on PEI and across Canada, the NPF will focus on the following priority areas:

Markets and Trade

Facilitate the maintenance and expansion of domestic and international markets and enhance the ability of the sector to seize and diversify market opportunities.

Science, Research, and Innovation

The NPF will focus on accelerating science, research and innovation to support the sector.

Environmental Sustainability and Climate Change

Facilitate clean growth while achieving progress on environmental sustainability and climate change mitigation and adaptation. The NPF will help address diverse regional, provincial, territorial and national agri-environmental priorities and support efforts to capitalize on possible opportunities.

Public Trust

Continue to encourage and support collaborative sector efforts to enhance public trust in agriculture.

Value-Added Agriculture and Agri-Food Processing

Support the continued growth of the value-added agriculture and agri-food processing sector and work to capture opportunities and address challenges.

Risk Management

Continue to focus on enabling risk management actions and facilitate a resilient sector.

Challenges Identified through Consultations

From the consultations the Department has had with clients and stakeholders, a number of challenges have been identified:

- The significant cost to developing and ensuring a reputation of quality.
- Continued challenges related to ensuring market access for producers on PEI.
- Producers and other stakeholders find it challenging to access the latest scientific and market-related research. It is challenging for stakeholders to obtain and integrate both production and market research information.

Opportunities Identified through Consultations

- There is an opportunity for the NPF to support increased access to market research. The NPF should support the development/acquisition of appropriate information to drive both production and marketing opportunities forward.
- The NPF should integrate initiatives which promote local food. The NPF should promote local food entrepreneurs and their continued development to enhance exports.
- The NPF should continue to build on the successes which have been achieved under the Growing Forward 2 (GF2) initiative.

Feedback on Growing Forward 2 Programs

With respect to the relevance, performance, and impact of GF2 programs at the PEI DAF, clients and stakeholders communicated that, overall, programs are working towards their stated objectives and are having a positive impact on the agriculture sector on PEI. Clients and stakeholders communicated a number of recommendations for the NPF, particularly related to streamlining program administration and reviewing the scope of programs on PEI compared to other jurisdictions.

Continuing Engagement

Continuing in 2017 and through to 2018, the PEI DAF will be consulting with clients and stakeholders to ensure that programs are responsive to the strategic objectives of the agriculture sector on Prince Edward Island. The performance, relevance and impact of NPF programs will be monitored through ongoing evaluation exercises.

¹ *Calgary Statement*. (2016). Available at: <http://tinyurl.com/znyg836>

INTRODUCTION

To plan for the next policy framework (NPF), the Prince Edward Island Department of Agriculture and Fisheries (PEI DAF) organized a number of industry and client consultation activities. These engagement activities included: surveys to clients and stakeholders with respect to the relevance, performance and impact of the GF2 programs; meetings with stakeholders; a consultation session with industry representatives (December 01, 2016), and an online feedback survey which was available in English and French. The engagement activities provided information on how programs are currently performing, and also challenges and opportunities which the NPF should address.

Engaging clients, industry and other stakeholders in program development and evaluation is important as it provides essential information with respect to understanding a program's operations and impacts. Stakeholders often have diverse interests and priorities and as such provide a diverse range of perspectives. This information is valuable to the PEI DAF for the purposes of program and policy development.

The main engagement activities were:

- **Growing Forward 2 Program Evaluation**

From 2015 to 2016, GF2 non-business risk management programs delivered through the PEI DAF were evaluated to see how these programs have collectively worked towards the three GF2 Policy Objectives: Competitiveness and Market Development; Industry Adaptability and Sustainability; and Innovation. The evaluation was based on an online survey with clients (160 responses); a survey with stakeholders; and key informant interviews with program administrators. The final evaluation report can be found on the PEI DAF's website.

- **Meetings with Stakeholders**

During regular meetings and presentations with stakeholders, the Department collected information on the key issues, challenges, and opportunities facing the sector.

- **Industry Consultation Session**

On December 1, 2016 the PEI DAF held an industry consultation session in Charlottetown with 27 industry members who represented the following organizations:

December 1, 2016, Consultation Session: Organizations	
• Cattle Producers Association of PEI	• PEI Fur Breeders Association
• Chicken Farmers of PEI	• PEI Hog Commodity Marketing Board
• Dairy Farmers of PEI	• PEI Horticultural Association
• Egg Farmers of PEI	• PEI Potato Board
• National Farmers Union – PEI	• PEI Sheep Breeders Association
• PEI Beekeepers' Association	• PEI Wild Blueberry Growers Association
• PEI Certified Organic Producers Co-Operative	• Young Farmers of PEI
• PEI Federation of Agriculture	

A draft report of the opportunities and challenges identified during the December 01 consultation was provided to attendees for feedback.

- **Online Public Feedback Survey**

From January – April, 2017, the public provided feedback to the PEI DAF through an online survey which was posted on the DAF's website, and available in English and French. The survey asked open-ended questions related to challenges and opportunities for the NPF. The survey collected a broad range of opinions from producers, processors, industry organization representatives, academics, and residents of PEI.

CHALLENGES AND OPPORTUNITIES IDENTIFIED BY THE SECTOR

Markets and Trade

Competitiveness

PEI's agriculture industry carries a positive worldwide reputation, but maintaining a positive reputation also contributes to a higher cost of production. Programs in other jurisdictions may create a competitive disadvantage for PEI producers.

Market Access

Maintaining market access is important. There continues to be trade barriers (i.e., market access issues) for PEI products or experienced by producers on PEI. Other countries can quickly change regulations and standards that limit PEI producer's market access.

Small Local Markets

Some commodities produce more product than can be consumed by PEI's population and therefore such commodities must rely on export markets. Promotion of local food alone cannot meet the marketing needs of the industry. Feedback also indicated that small producers, including those that focus on local markets, have different programming needs.

Supply Management Challenges

Feedback indicated concerns that new trade agreements will allow increased imports of dairy products which erode domestic market share for Canadian producers.

Transportation

In the context of PEI's small geography, transportation costs and access to ports can be a challenge for industry. Producers often ship in small amounts and there is a lack of centralized shipping coordination.

Standards and taxes

Governments should support industry to maintain a level playing field for producers on standards and taxes. This will assist producers in remaining competitive on a global-scale.

Local Food Promotion

Promotion of local food is important. Clients and stakeholders communicated that an increase in consumption of local food would reduce food imports and subsequently reduce costs and the environmental footprint created by shipping outside of the region.

Strengthen the PEI Brand

It is important to work towards distinguishing PEI and Canadian products from other jurisdictions.

Meeting Market Demands

Initiatives should help industry to meet demands coming from the market place. There should be support to continually improve and expand markets. Suggestions included support for packaging, labeling, value-adding, and other activities that support market access (e.g., disease management).

Market Research

Industry needs support in accessing market research. Market research would assist industry in finding new markets and would better inform industry in terms of what products to produce.

Capacity Building

There is value in government support for learning new skills in the area of marketing and trade. For example, training activities which support a business venturing into value-adding. It was mentioned that agricultural education should offer training in export and marketing and that educational programs could be an opportunity for partnership between the PEI DAF and the PEI Department of Education.

Product Development

Support for equipment or infrastructure to develop new products or practices would help to meet market requirements and develop new markets.

Assurance Systems

Industry requires support for assurance systems. Support is needed in order for industry to adapt to new expectations for implementation of assurance systems and to prepare for future demand. Concurrently, support is also needed to maintain the systems once they are in place (particularly for traceability systems).

Shipping Coordination and Access to Ports

Efforts to centralize or coordinate shipping of products would allow small producers to come together to reduce the cost of transportation and provide greater access to markets. Improving access to ports on PEI for shipping products was an opportunity highlighted in discussions.

Potential Markets and Trade Activities

- Support for finding out what is required to capture an identity and differentiate a product (e.g., market research).
- Promotional activities at the commodity level and at the brand-specific level.
- Strengthening the brand of both Canadian and PEI products.
- Using "Farmer Profiles" to brand products and promote public trust (e.g., videos in grocery stores showing the farmer that produced the product).
- Encouraging large companies to select Canadian products as part of their branding strategies.
- Support to offset the costs associated with branding.
- Development of material to identify where local food can be purchased (e.g., maps and websites).
- Support for small processing plants to encourage residents of PEI to buy local.
- Government should hire a Provincial Market Access Officer specifically for agriculture.

Science, Research, and Innovation

Communication, Education, and Access

Although there is a large breadth of agriculture research, it is not necessarily regionally specific. Furthermore, consumers and farmers are not always aware of the applicable research, therefore, research is not often adequately transferred to commercialization on the farm.

Funding

Accessing funding to follow through on innovative ideas is often a challenge. Accessing funding for on-farm production research is also sometimes a challenge for industry.

Research Coordination

While continued support for research activities is important, funding for research projects under the NPF should avoid supporting projects which duplicate existing research. Quality of research would improve by providing research coordination support. Continuing support of research from the idea stage to knowledge transfer is important.

Communicating Research Results

Promotion of the results of research would encourage better practices, as well as develop public trust in agriculture. Communication is key to ensuring that both the public and producers are well informed about the latest research and its results. This will build public trust and avoid duplication of research. Additionally, providing greater access to research supports the continuing education of the sector.

Expert Advice

Having experts available to support the sector is important. Feedback indicated that governments should employ more experts to support the interpretation and dissemination of science, research and market-related information. Further, these individuals should provide support and direction for various agriculture programs and initiatives.

Product Development Research

Research should support product development.

Market Research

Market research should provide insight into what the consumer is looking for with respect to value-added products.

Potential Science, Research, and Innovation Activities

- Variety-specific research (e.g., crop variety).
- Support for research about livestock temperature tolerance.
- Support for research on the stress of vaccinations on calves.
- Support for access to market-related research.
- Develop a program for livestock that is similar to the Horticultural Assurance Program.
- Bee research, specific to PEI.

Value-Added and Agri-Food Processing

Imports and Exports

Often products need to be exported out of PEI to be modified, and then imported back for distribution. This process increases production costs, and can represent a significant challenge to the sector.

Processing Facilities

One of the biggest challenges facing value-added agriculture on PEI is the lack of processing facilities.

Regulations

Feedback indicated that processing-related and other regulations are often a stumbling block for the agriculture sector on PEI.

Funding

Funding is key to developing new value-added and processing methods and investing in various changes to improve products for the consumer.

Regional Collaboration

Regional collaboration in value-added and agri-food processing is seen to be important. Such cooperation will better position PEI to remain competitive.

Local Food Processing and Production

Supporting local food processing and production is important.

Regulations

Assistance should be considered to ensure existing and new food entrepreneurs can meet and exceed market standards required by the Canadian Food Inspection Agency (CFIA) and export markets.

Expert Advice

Overall, feedback indicated that government should utilize experts and navigators to support clients and stakeholders in accessing value-added and agri-food processing programs, identify opportunities, mentorship activities, and consulting services.

Potential Value-Added and Agri-Food Processing Activities

- Market research to understand consumer demand for value-added.
- Wage subsidies to hire skilled labor.
- Support for infrastructure such as on-farm storage facilities.
- Subsidies for energy and transportation improvements.
- Support for technology for animal traceability.
- Support for improved grain processing on PEI.

Environmental Sustainability and Climate Change

Research

Overall, there is a lack of research on ways agriculture can better promote environmental sustainability and mitigate the negative effects of climate change. This represents a challenge for the sector.

Research initiatives which advance environmental sustainability and public trust are beneficial.

Feedback indicated that a culture of continuous environmental improvement is needed to support programs related to environmental sustainability and climate change.

Climate Change

Climate change is impacting crops on PEI. Furthermore, some industry leaders have begun to consider the future need for irrigation systems given the changing climate.

Programming to mitigate climate change needs to be flexible to allow industry to address a variety of impacts. Carbon sequestration could assist in meeting climate change goals. Programming could encourage carbon sequestration through supporting appropriate farming practices.

Potential Environmental Sustainability and Climate Change Activities

- Support for climate change adaptation projects.
- Support for research on ways to reduce greenhouse gas emissions.
- Support for research on variety development which reduces greenhouse gas on a larger scale.
- Support for research which is tailored to a specific farm or area on PEI.
- Hiring experts to research, synthesize, and disseminate environmental and climate change research which has been conducted in other regions.
- Support for a mentoring program to build experience and transfer knowledge related to environmental and climate change best practices.
- Development of models to capture rain water for future use.
- Support which encourages environmentally friendly practices.

Public Trust

Public Awareness

Feedback indicated that, overall, there is a lack of public awareness on PEI about agriculture. This represents a challenge for the sector in developing public trust in agriculture.

Expert Advice

There is a lack of expertise in the industry's ability to synthesize and critically assess a broad range of conflicting information related to agriculture. When inaccurate information is not publicly corrected, it can negatively impact the public's perception of agriculture.

Feedback indicated that industry is concerned that there currently exists a gap in expert advice related to the results of research and the communication of the results of research. Expert advice or support is also lacking in areas related to translating the results of research from small-scale plots to other situations.

The Public

The public has a range of expectations for agriculture, and conflicting information can reduce public trust. As such, initiatives which support open and honest communication with the public are important in increasing public trust in agriculture.

Resources

Promoting public trust in agriculture requires additional resources. For example, costs associated with developing public communication products; staff resources to help "get the message out"; and funding for school-aged education programs.

Potential Public Trust Activities

- Holistic labels that identify environmental factors and impacts to woodland, soil, bees, cattle, hogs, etc.
- Support for the promotion of agriculture in traditional media as well as social media.
- Support for public awareness activities which educate about the regulations being followed by producers to ensure a safe product.
- Support for public awareness activities which educate the public about the financial costs associated with following regulations.
- Support for more agriculture promotion events such as: Farm Day in the City; Fall Flavors; Day on the Farm; Old Home Week; etc.
- Additional agriculture education in the K-12 school system. Activities could include hosting classes on farms which would allow students to familiarize themselves with agriculture.
- Support for small community gardens or greenhouses.

FEEDBACK ON *GROWING FORWARD 2* PROGRAMS

The evaluation of the PEI DAF's GF2 programs identified findings related to the performance, relevance and impact of programs, as well as opportunities for improvement. A final evaluation report can be found on the PEI DAF's website.

FINDING	
<p>Performance The <i>performance</i> of programs were evaluated to identify program accomplishments, particularly progress towards preestablished goals.</p>	<p>Eighty per cent of client respondents indicated that the GF2 programs are administered efficiently. Communication activities are working to inform members of the agriculture sector on PEI about the GF2 programs</p>
<p>Relevance The <i>relevance</i> of programs were evaluated to determine the degree to which programs are important to users.</p>	<p>Seventy-eight per cent of client respondents indicated that the GF2 program responded to their needs as a member of the Agriculture sector. Fifty-four per cent of stakeholder respondents indicated that overall, the effectiveness of the GF2 programs for the sector to which they represent was "good-excellent".</p>
<p>Impact The <i>impact of programs</i> were evaluated to identify the changes that are most likely attributable to the program.</p>	<p>The majority of clients and stakeholders reported that programs are having a positive financial impact on the agriculture sector on PEI. Sixty-five per cent of client respondents indicated that the overall financial impact from participating in the program was "good-excellent". Sixty-three per cent of stakeholder responses indicated that programs support the sector's efforts to be more profitable.</p>

Improvements

Clients and stakeholders identified challenges with respect to program administration. To address these challenges the administration of NPF programs should aim to:

- Streamline administrative processes so that there is a reduction in paperwork for applicants.

With respect to the scope of the PEI DAF's GF2 programs, the evaluation found that planning for the NPF should include:

- Reviewing the scope of similar programs in other jurisdictions to see if the PEI DAF's programs are comparable with respect to eligible projects, initiatives, and activities

OTHER FEEDBACK

Relationship Building

NPF Programs should create and support relationships among members of the agriculture sector.

Infrastructure

Consultations indicated that industry values support for infrastructure programs (e.g., for barns and equipment such as ventilation).

Small farms

The needs for small farms are different from larger commercial operations. As such, there should be programs which support smaller-scale operations. Start-up programming and other resources are beneficial. Feedback indicated that this represents an investment in rural communities and a means of building the trust of the public.

GF2 (Business Development Program)

Some feedback indicated that the Self-Assessment process of the Business Development program was not helpful, and that a peer or group assessment should be considered for the NPF.



Additional Information

Agriculture and Agri-Food Canada. (2016). *Share your experiences and ideas for the next agricultural policy framework*. Available at <http://tinyurl.com/hf4c4tm>

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