

2023 Industry Survey

Conducted by the BC Council of Marketing Boards

To: All Stakeholders
15 December, 2023

BCVVMC

BC VEGETABLE MARKETING COMMISSION

INTRODUCTION

The BC Council of Marketing Boards conducted this evaluation at the request of the BC Vegetable Marketing Commission to elicit feedback from industry stakeholders that will inform the Commission's next strategic plan.

The evaluation consisted of three sections:

Section A - Trust and Integrity

Section B - Information & Communication

Section C - Going Forward

Survey participants were asked to consider the activities of the commission that took place over the past three (3) years.

This report has been prepared using data collected between October 10th and 20th, 2023

- There were 47 completed surveys
- Response rate is 26% (47/170)



A Snapshot of the Survey



72% of total respondents are producers



75% of Agency respondents feel that their trust in BCVMC has increased over the past 12–18 months



93% of the respondents either agree or somewhat agree that the Commissions publications and newsletters are timely and informative



Survey Takeaways on Commission priorities:

1. Enhance Communication
2. Timely Decision Making
3. Agency Accountability
4. Enforcement

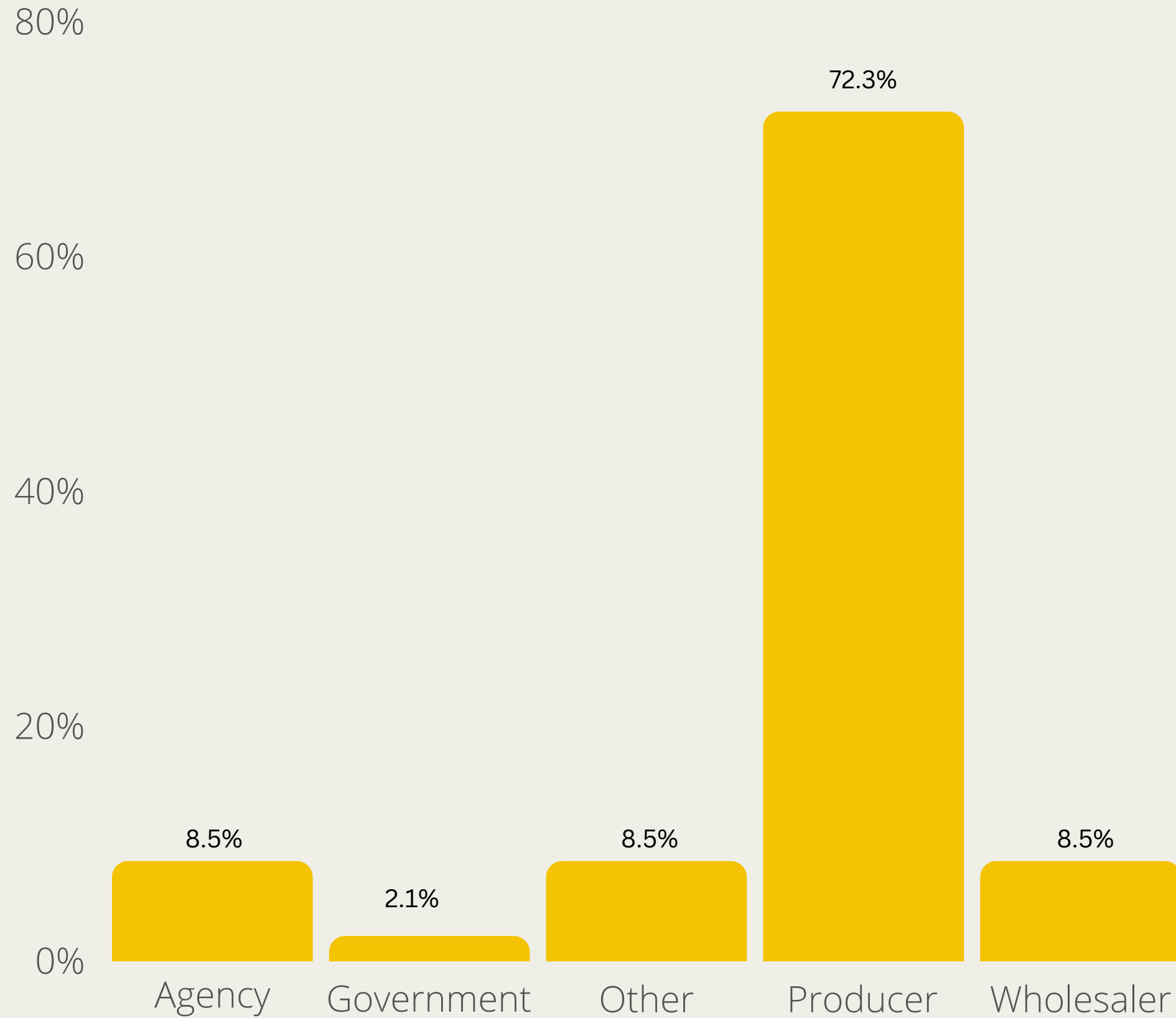
BCVMC

BC VEGETABLE MARKETING COMMISSION

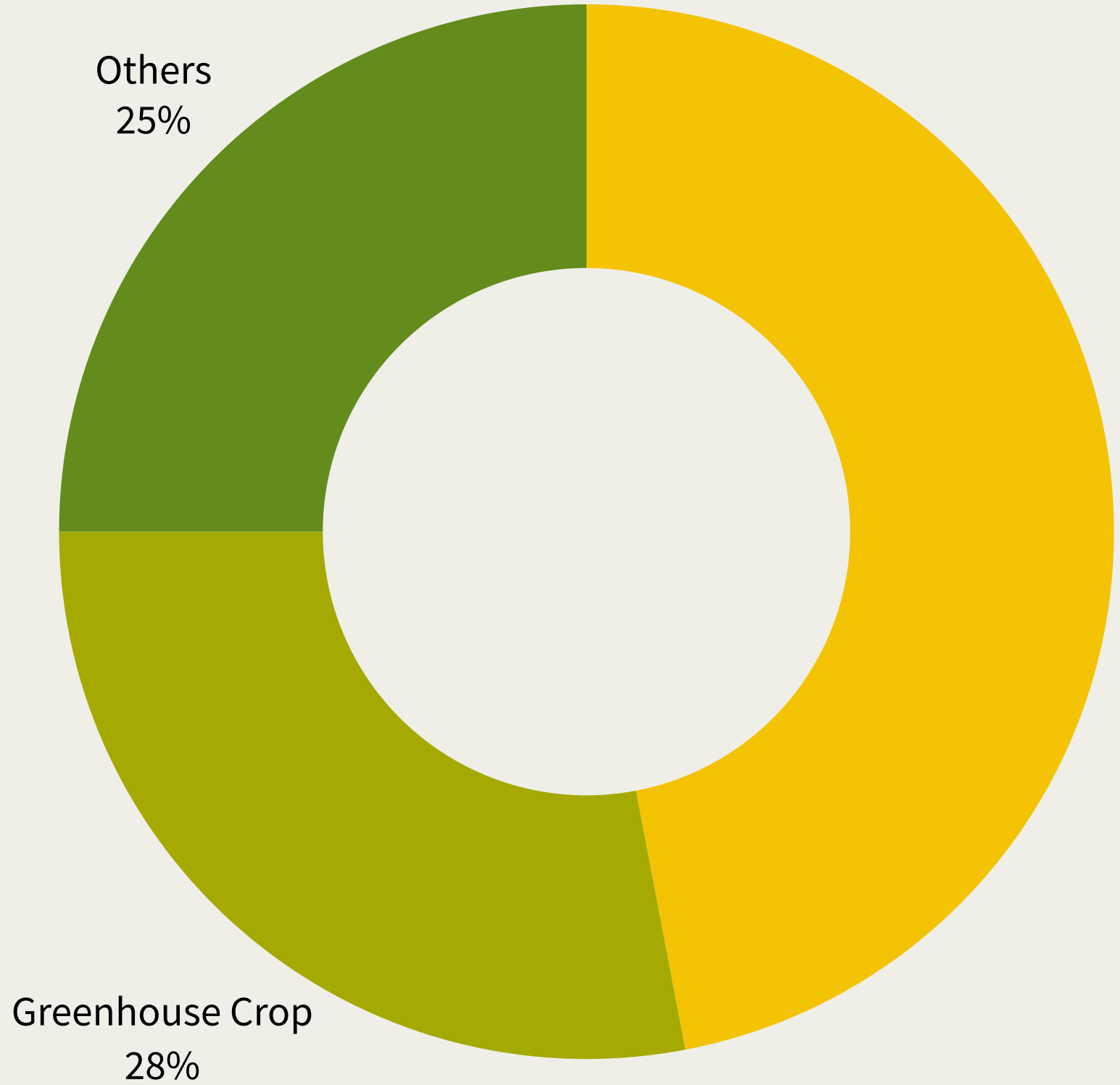
Which survey group do you belong to?

The respondents were asked which survey group they belong to:

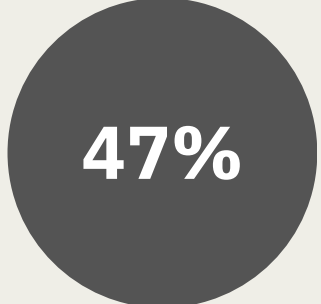
- Producer
- Agency
- Wholesaler
- Government
- Other which includes commissioners, education etc.



Which Industry do they belong to



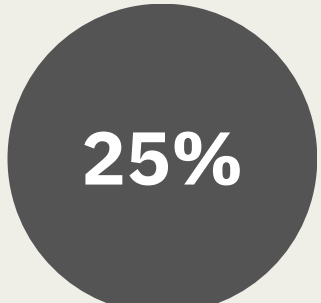
Storage Crop
47%



Identify as Storage Crop (includes processing)

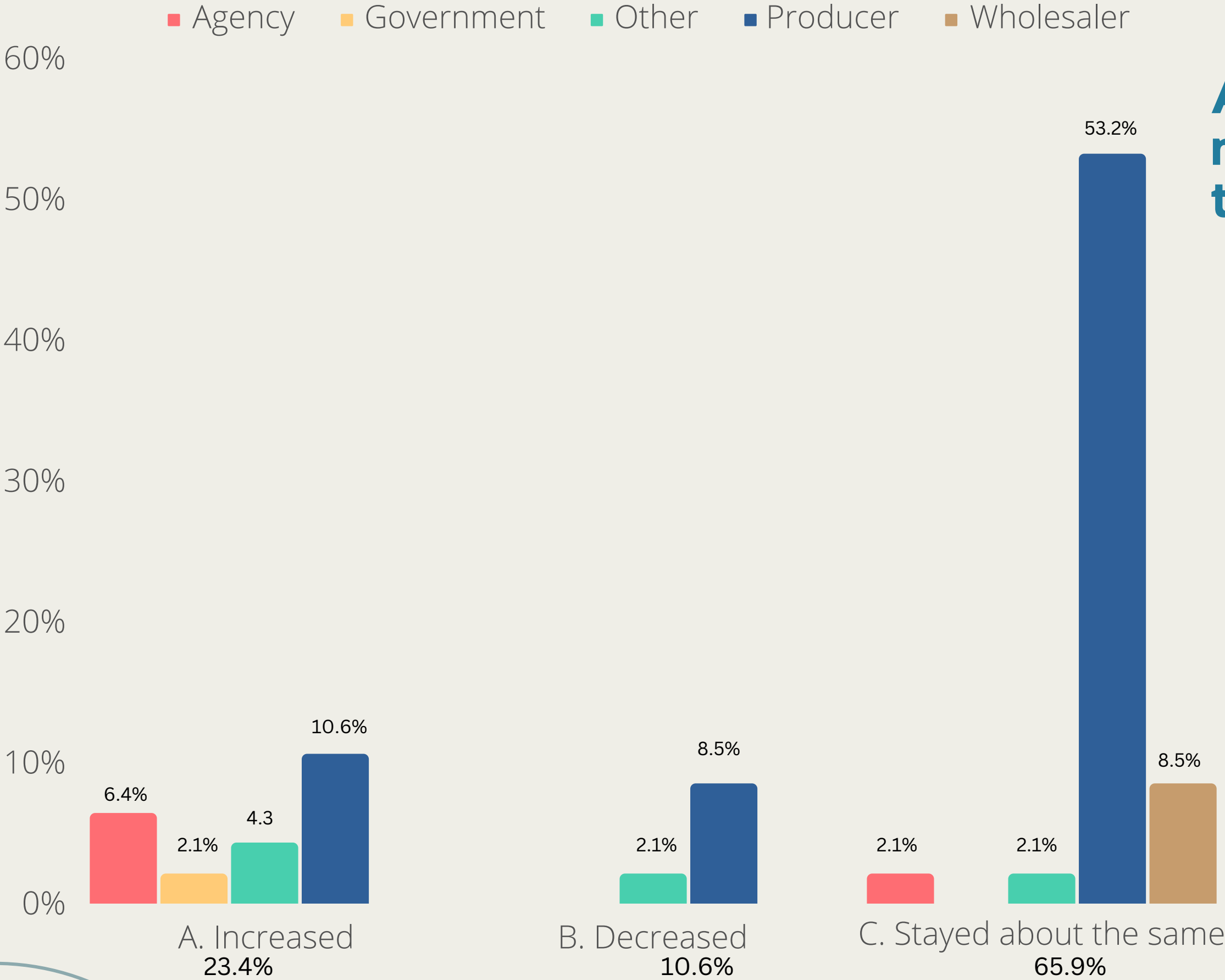


Identify as Greenhouse Crop



Identify as others which include wholesalers, fresh market, government, seed potatoes, etc.

Section A: Trust and Integrity



A.1 Over the past 12 to 18 months, would you say your trust in BCVMC has:

- 74% of the respondents who identify as producers believe that their trust in the BCVMC has remained the same while 14% feel it has increased.
- Also, 75% of agency respondents feel that their trust in BCVMC has increased over the past 12-18 months.

Section A: Trust and Integrity

A.1 Additional Comments

- BCVMC seems to be closer and closer all the time to a full staffing compliment for its activities.
- Storage crop commissioners are associated with one agency. Five members of the storage crop advisory panel represent one large agency.
- Consulting with the advisory committee is a good step forward.

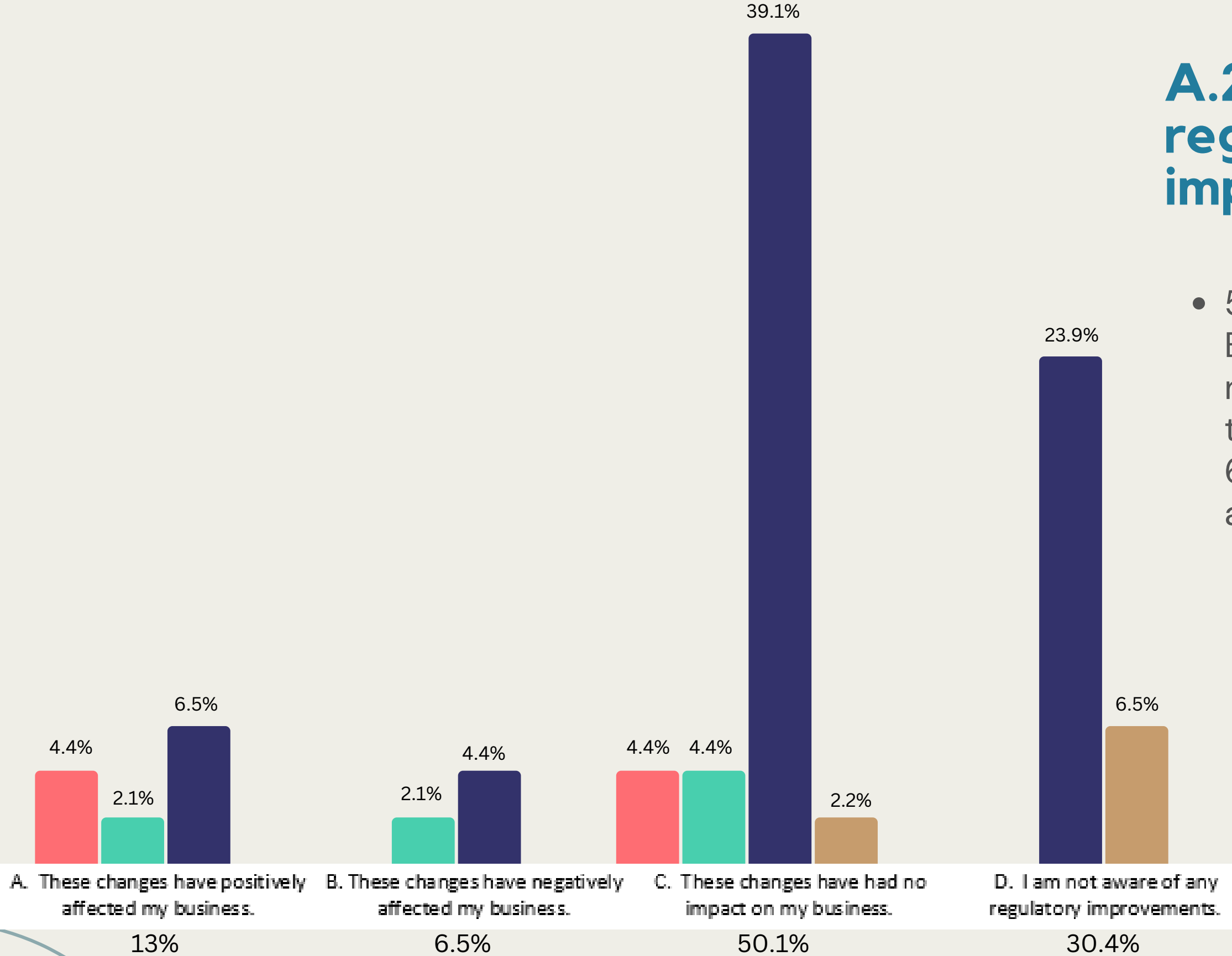


Section A: Trust and Integrity

■ Agency ■ Other ■ Producer ■ Wholesaler

A.2 How has the BCVMC's regulatory improvements impacted your business?

- 50% of total respondents believe that the BCVMC's regulatory improvements have not impacted their business at all while 24% total respondents who are producers and 6.5% who are wholesalers are not aware of any regulatory improvements.



Section A: Trust and Integrity

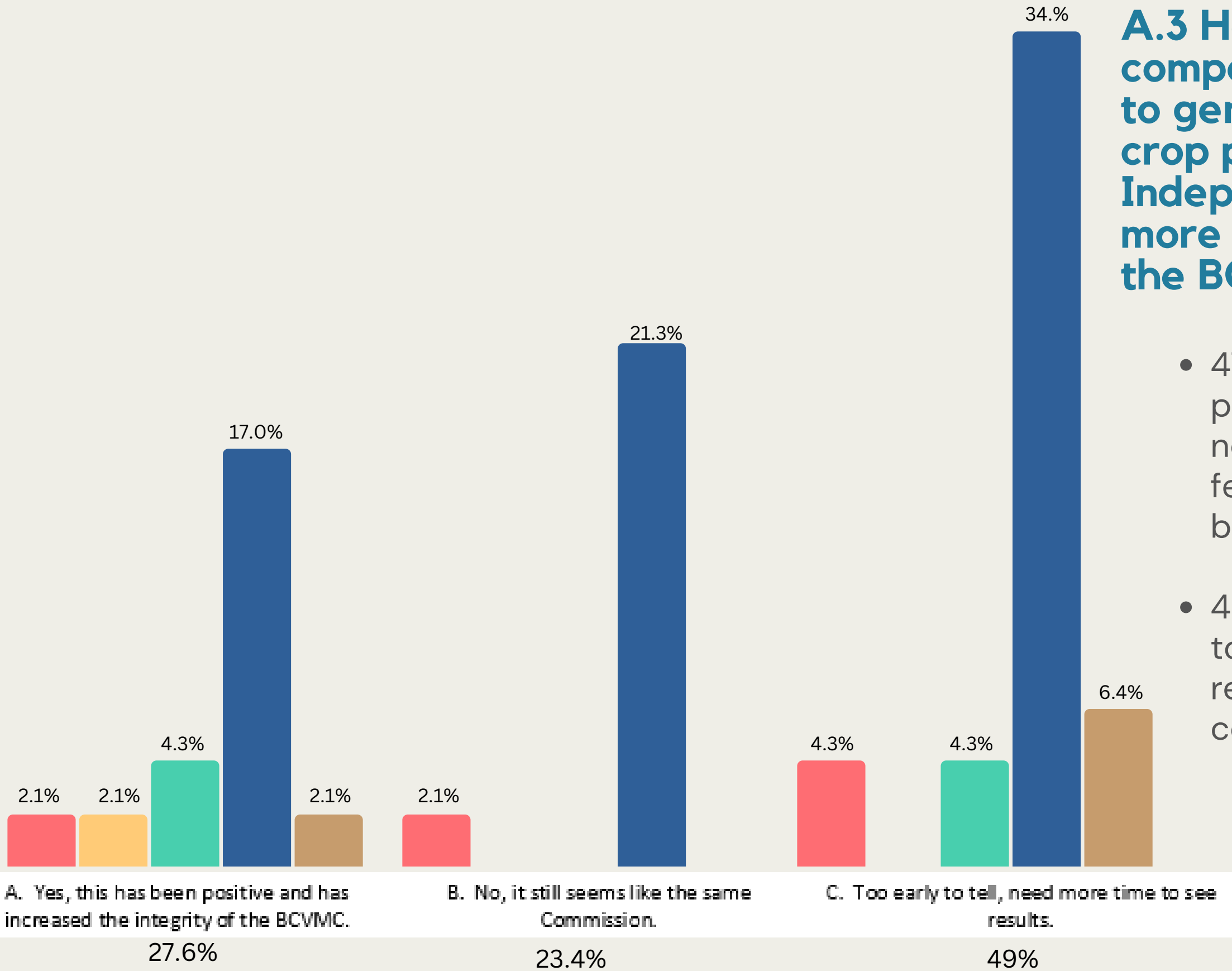
A.2 Additional Comments

- Changes haven't been seen but understand they are being explored.
- Regulatory improvements reduce complaints to government about BCVMC decisions and governance. Seems to indicate that the regulations are clearer, and that compliance and enforcement is functioning.
- A lot of discussions towards change is up in the air and still ongoing discussion towards a decision due to differences of opinions of members as of now.



Section A: Trust and Integrity

■ Agency
 ■ Government
 ■ Other
 ■ Producer
 ■ Wholesaler



A.3 Have the changes to the composition of the Board (i.e., change to general greenhouse and storage crop positions and the addition of Independent Members) given you more confidence in the integrity of the BCVMC?

- 47% of respondents who identify as producers believe its too early to tell and need more time to see results while 23% feel that changes to the composition of board has been positive.
- 49% of the total respondents believe its too early to tell and need more time to see results while 28% feel that changes to the composition of board has been positive.

Section A: Trust and Integrity

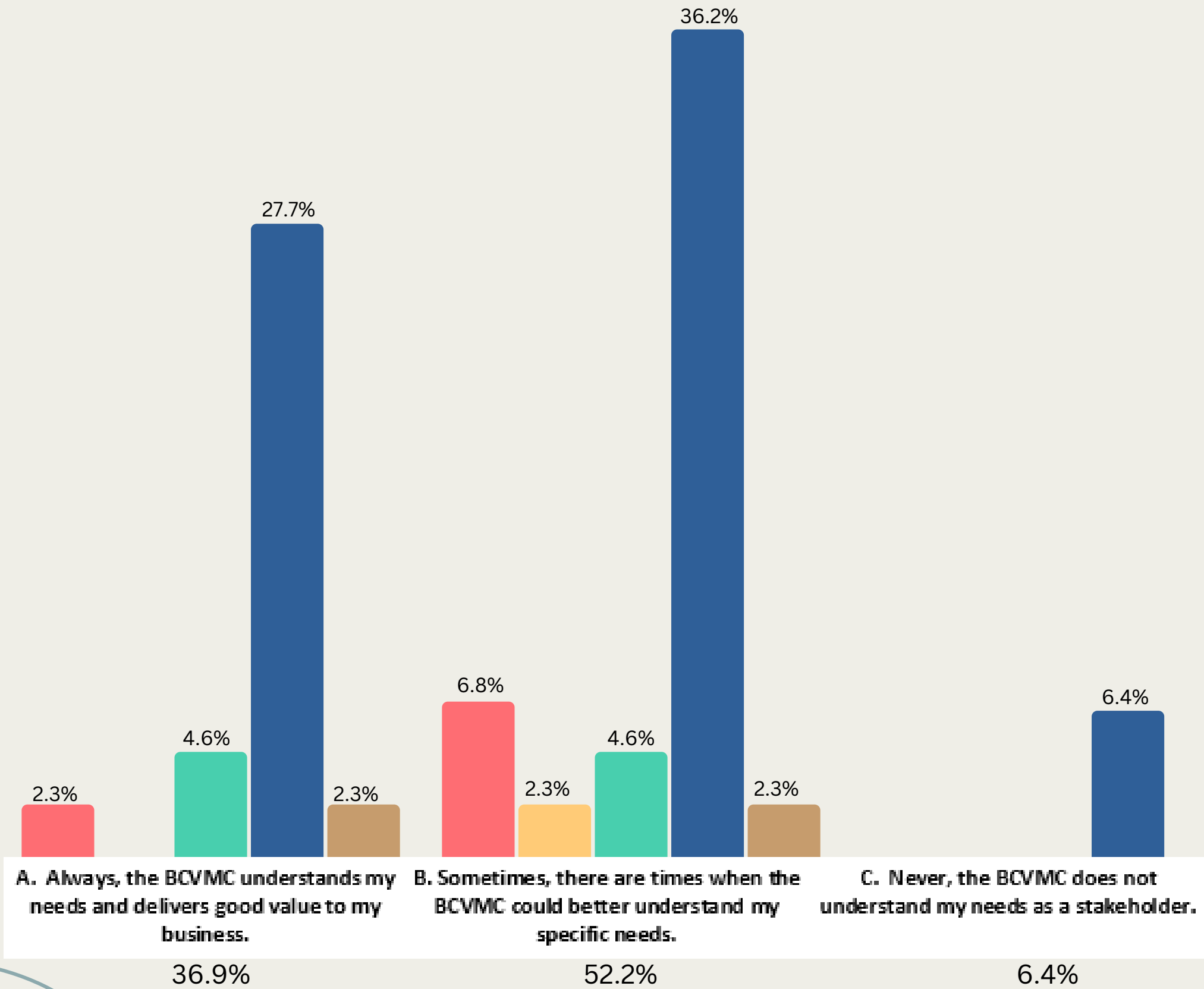
A.3 Additional Comments

- Independent members add objectivity, all commission positions filled, engaging industry members in their area of expertise and experience
- Even in the past Commission has been doing well and will continue to work with strong members who know the industry



Section A: Trust and Integrity

■ Agency
 ■ Government
 ■ Other
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 ■ Wholesaler



A.4 The BCVMC understands and is responsive to my needs as an industry stakeholder.

- 50% of respondents who identify as producers believe that BCVMC could better understand their specific needs.
- 75% of respondents who identify as agencies feel that there are times when the BCVMC could better understand their specific needs.

Section A: Trust and Integrity

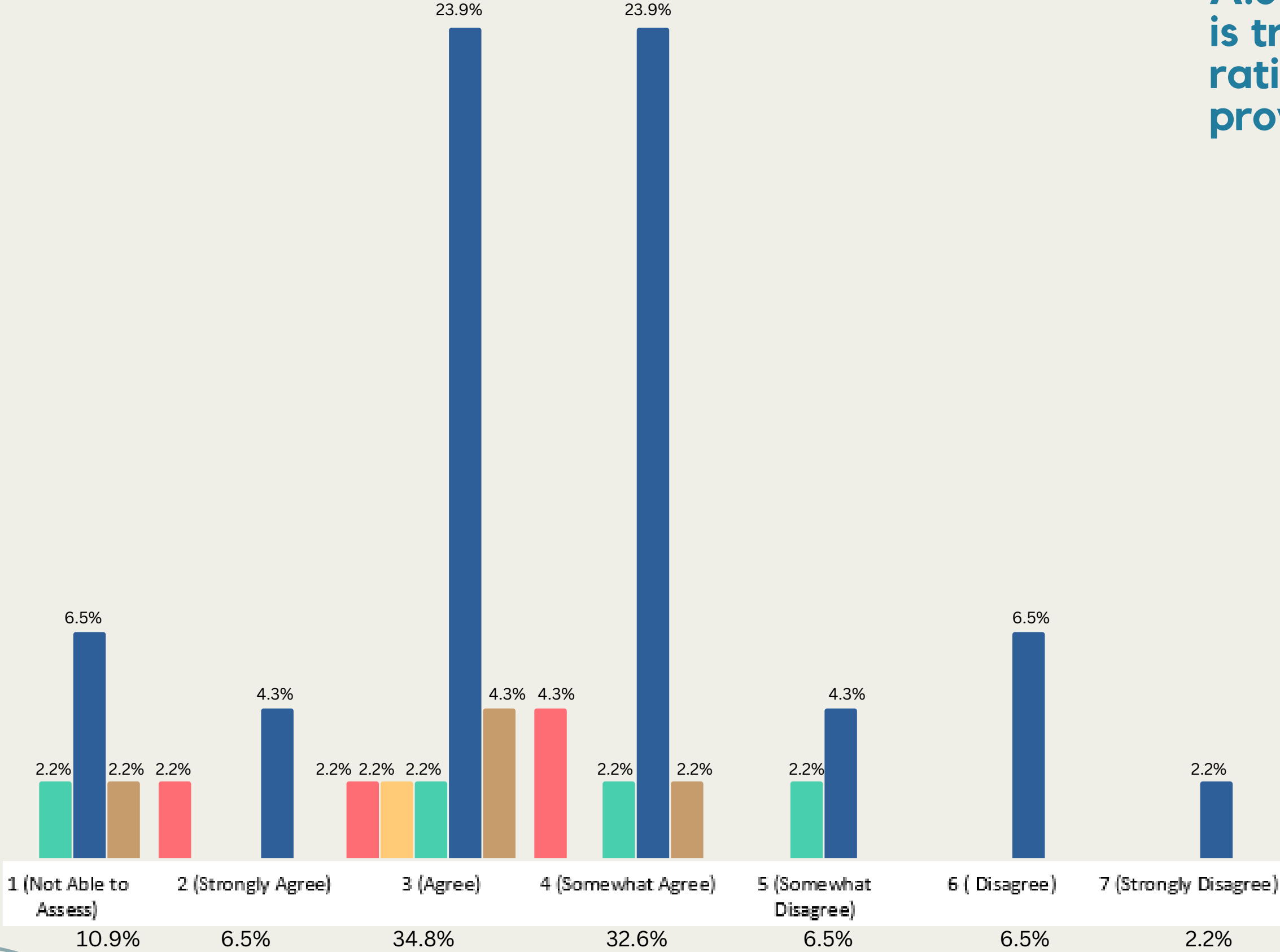
A.4 Additional Comments

- Applications for anything take far too long, such as quota transfers, new entrants, etc.
- Things are improving in terms of project management (administered funds). Reconciliation seems like an unwieldy process that would improve with in-house book-keeping



Section A: Trust and Integrity

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A.5 Commission decision-making is transparent, with clear rationale and explanations provided.

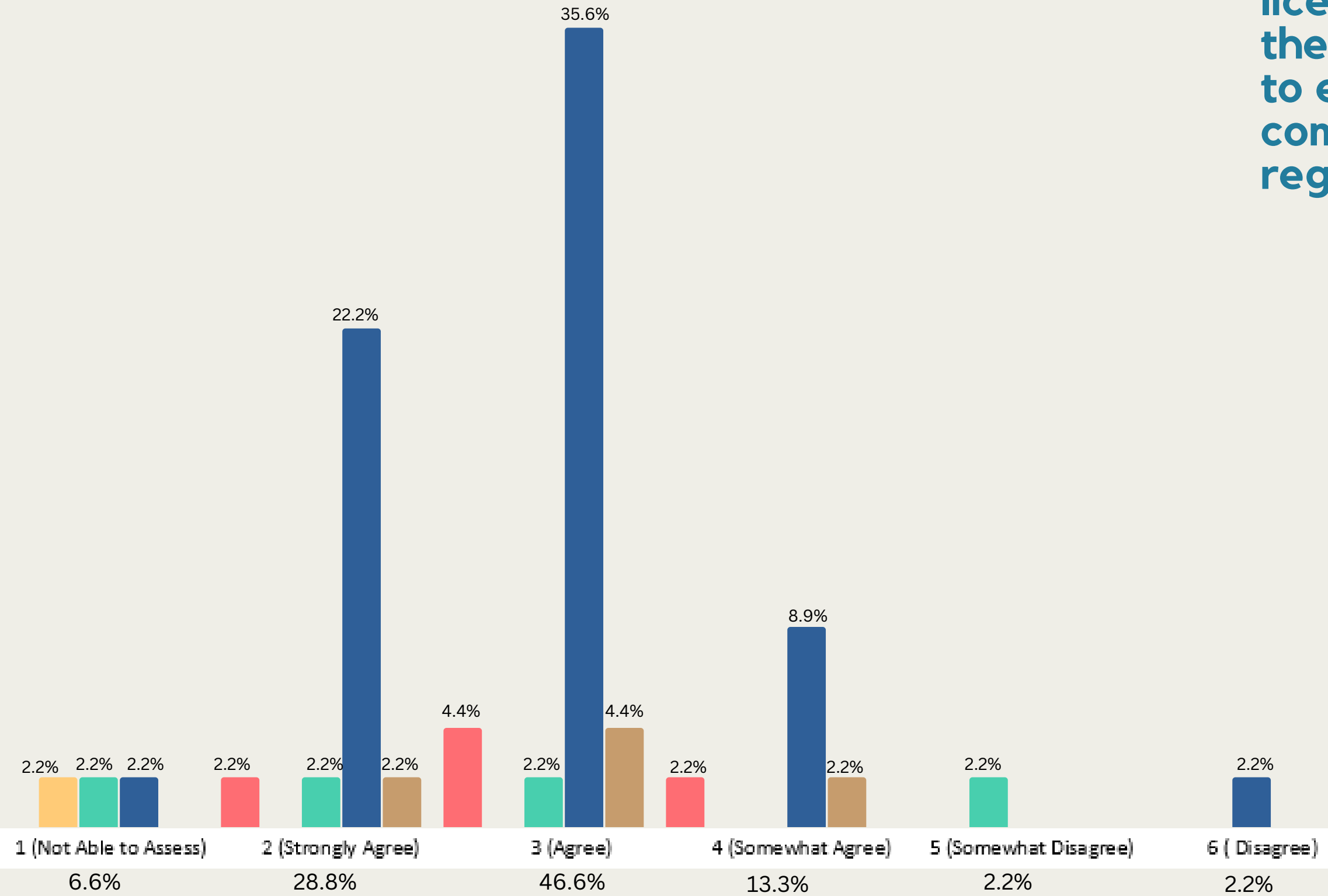
- 72% of respondents who identify as producers agree that Commission decision-making is transparent while 18% disagree, somewhat disagree or strongly disagree that the Commission decision making is transparent.
- Also, all agency respondents feel that Commission decision-making is transparent.

Section B: Information and Communications

■ Agency ■ Government ■ Other ■ Producer ■ Wholesaler

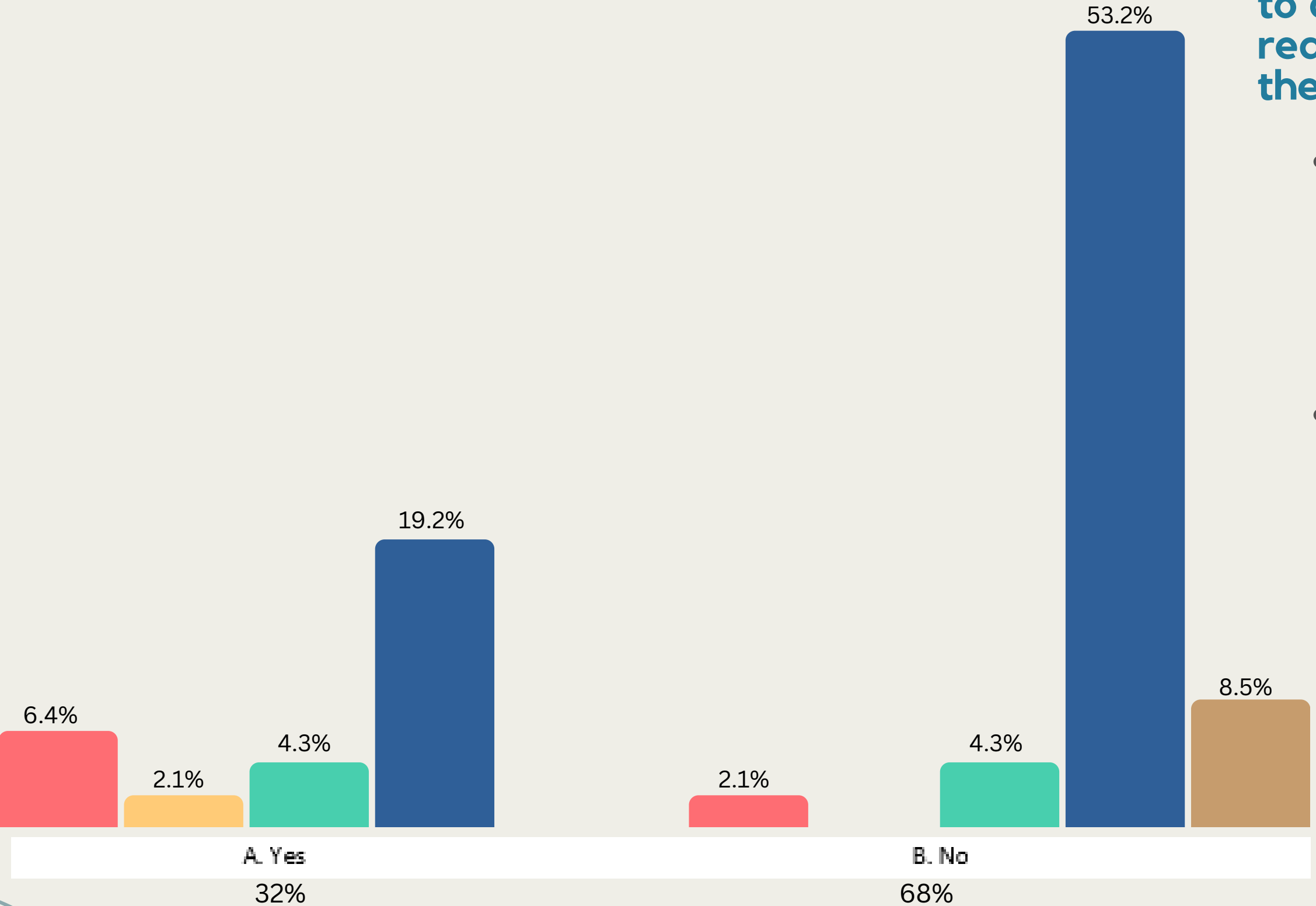
B.1 I receive all the information, licenses, and permits I need from the Commission in a timely manner to effectively run my business in compliance with industry regulations.

- 89% of all respondents either strongly agree, agree or somewhat agree that they receive all the information, licenses, and permits from the Commission in a timely manner.



Section B: Information and Communications

■ Agency ■ Government ■ Other ■ Producer ■ Wholesaler

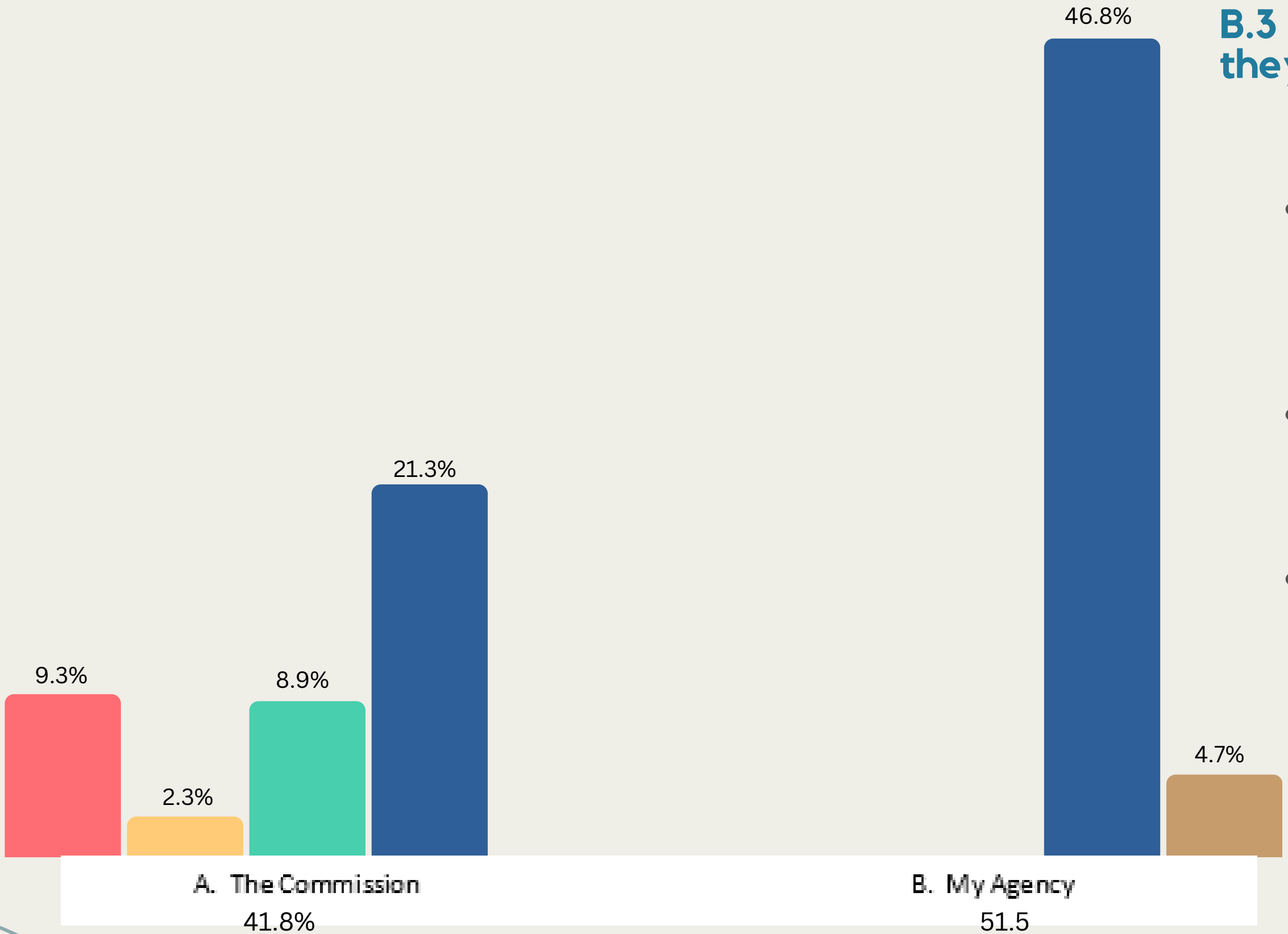


B.2 Have you had a reason or a need to access the Commissions policies, requirements and/or documents in the past 12 to 18 months?

- 74% of respondents who identify as producers, and all wholesalers had no reason or a need to access the Commissions policies, requirements and/or documents in past 12/18 months.
- 26% of respondents who identify as producers and 75% of respondents who identify as agencies had a reason or a need to access the Commissions policies. They further agreed that the documents and Commission policies were readily available and were easy to understand.

Section B: Information and Communications

■ Agency ■ Government ■ Other ■ Producer ■ Wholesaler

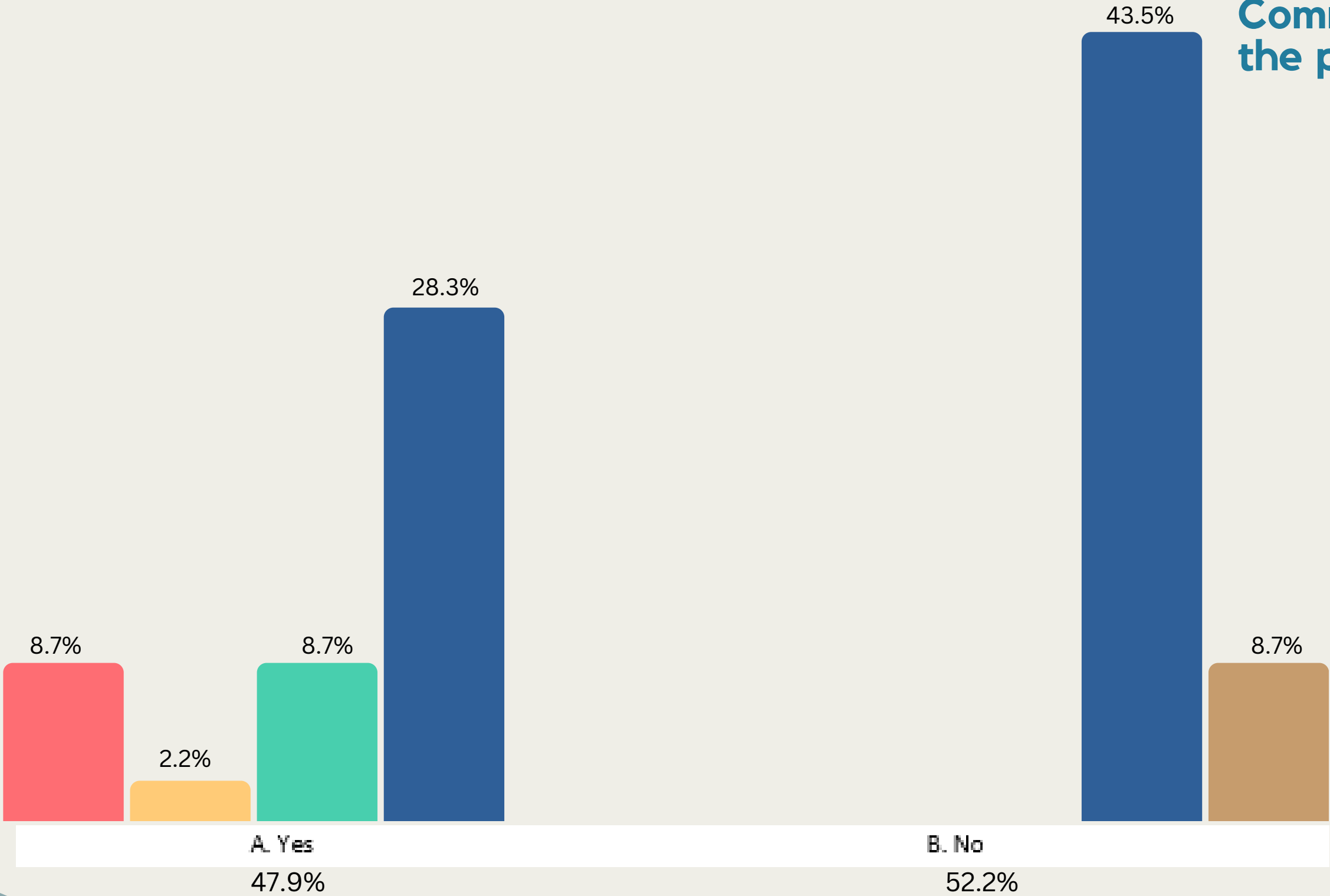


B.3 Who do you usually contact when they have an issue?

- 65% of respondents who identify as producers contact their agency if they have an issue while 30% contact The Commission.
- All respondents who are agencies and Government contact The Commission if they have an issue.
- No response: 6.7%

Section B: Information and Communications

■ Agency ■ Government ■ Other ■ Producer ■ Wholesaler



B.4 Have you had a need to contact Commission staff for any reason in the past 12 to 18 months?

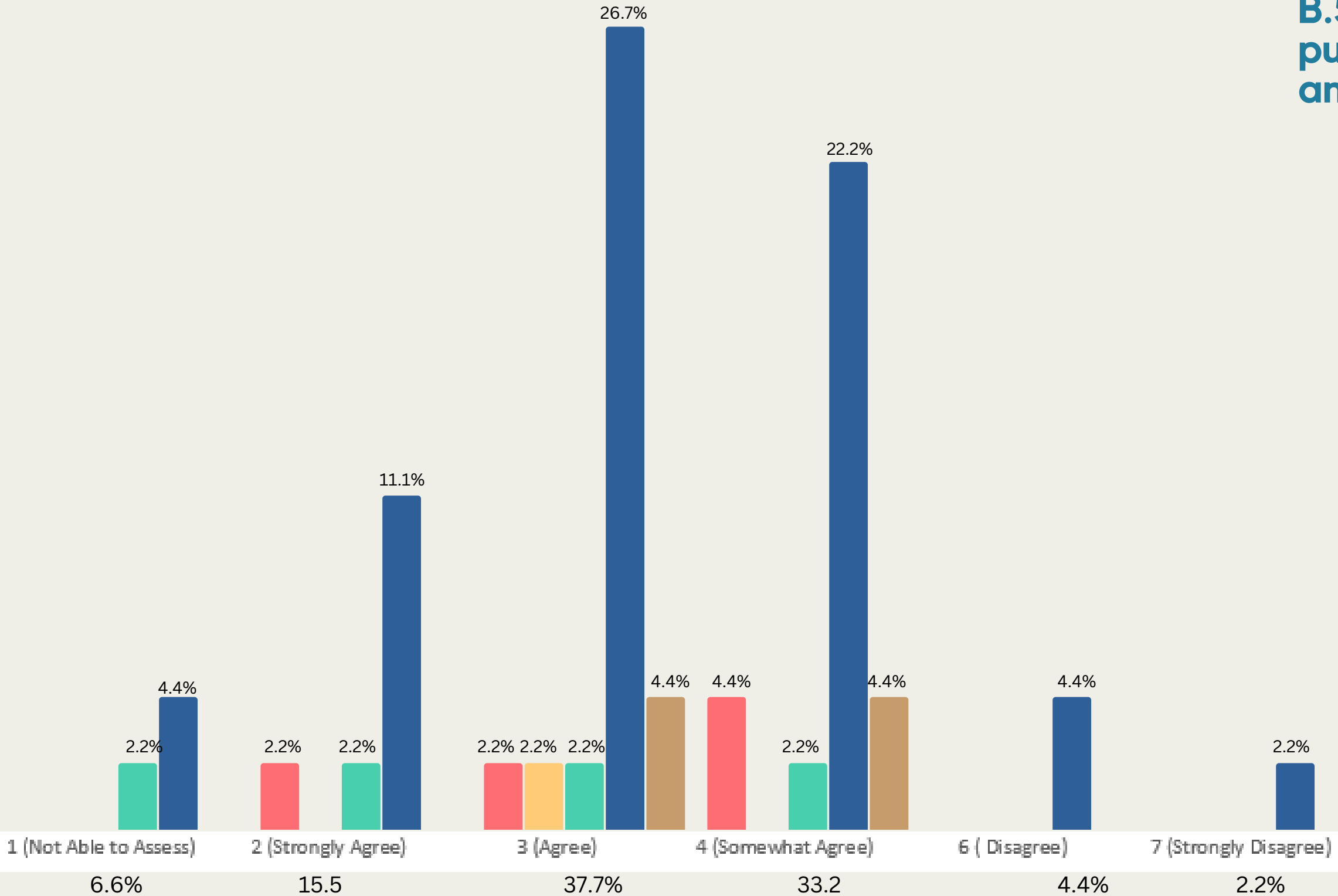
- 48% of the total respondents had a need to contact Commission staff for some reason in the past 12 to 18 months. Out of which 28% are producers and 9% are agencies and wholesalers.
- The respondents further added that the staff member was able to satisfactorily resolve their issue or request in a timely manner.

Section B: Information and Communications

■ Agency
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 ■ Wholesaler

B.5 Do they find the Commission's publications and newsletters timely and informative?

- 86% of the total respondents either agree or somewhat agree that the Commission's publications and newsletters timely and informative.



How can the Commission Improve Communications?

Speed up the decision-making process

Respond to inquiries quicker

Greater transparency and understanding of growers needs

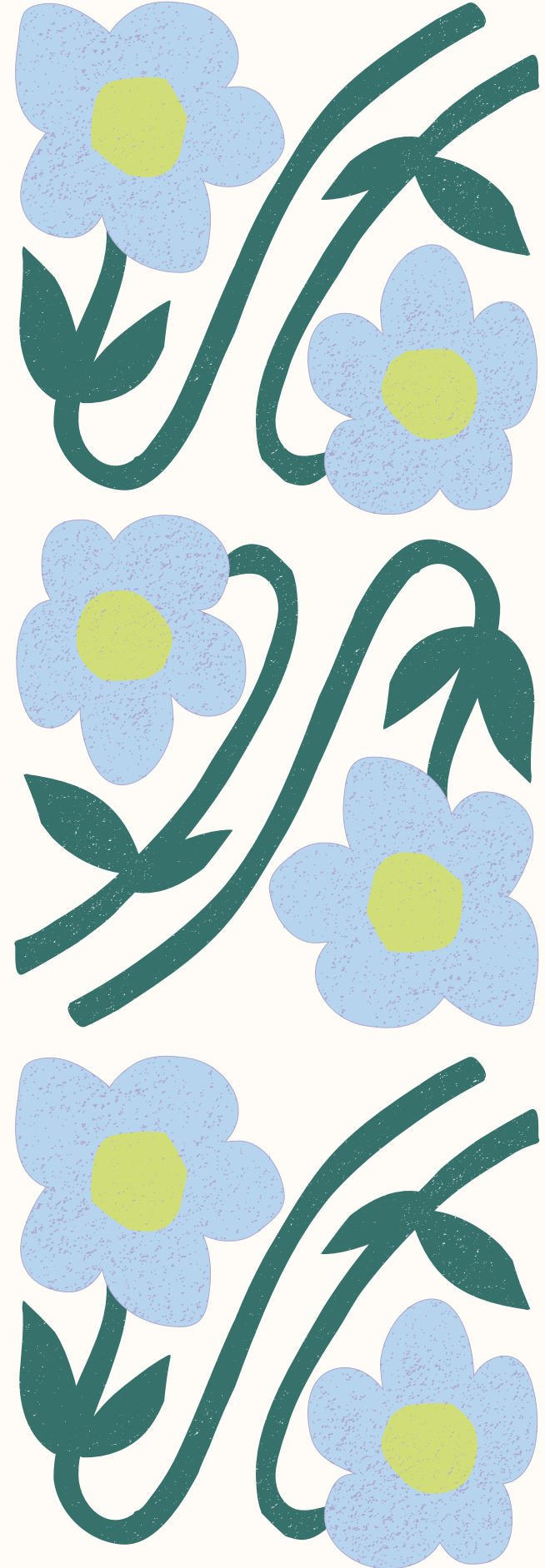
Inform producers about decisions that relate to their business

Make the website more informational

Circulation of ongoing (but short) messages, including major decisions and activities

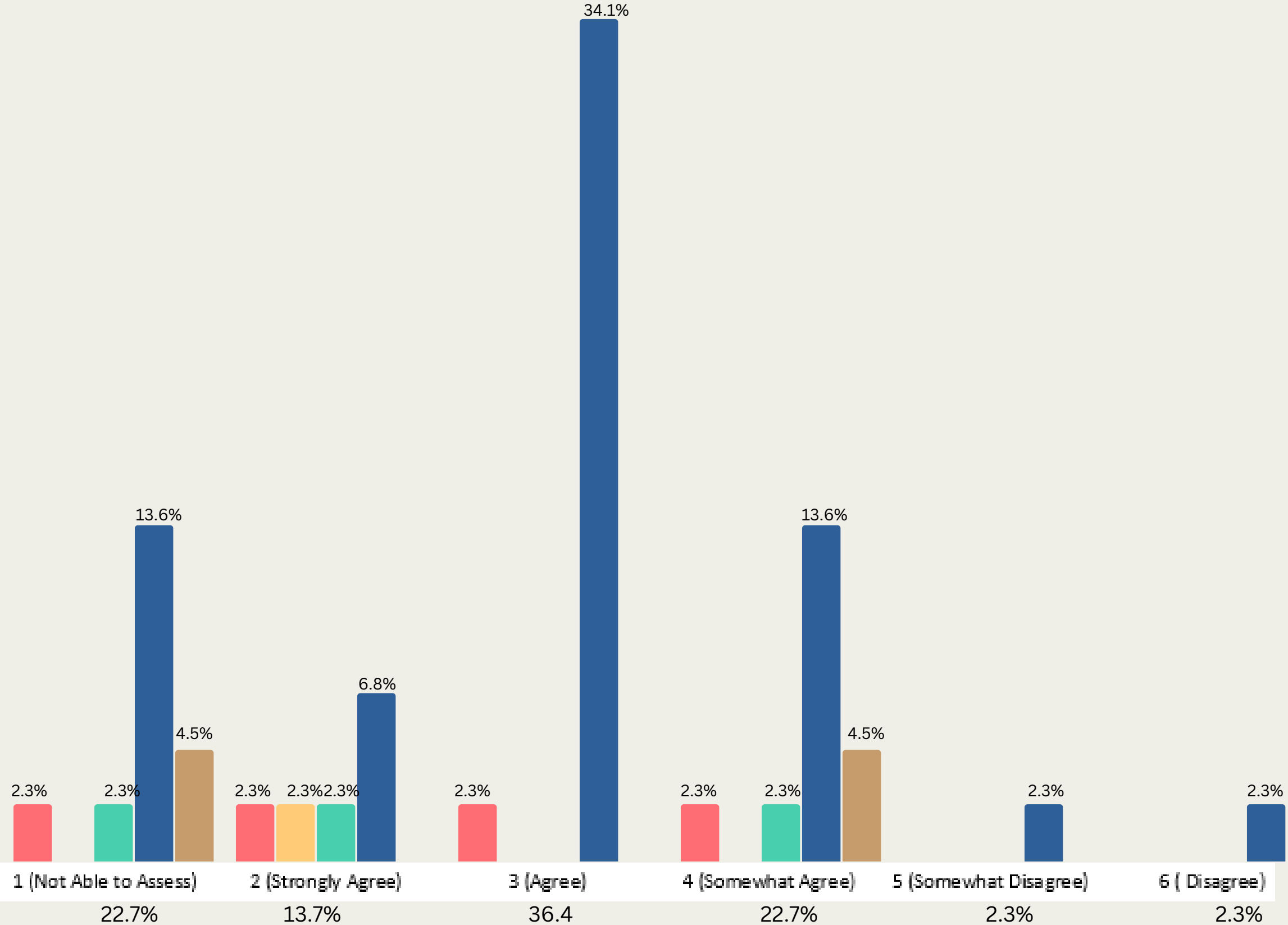
Put more small producers on the board who do not have any governance over an agency.

Restructure town halls advisory committees as they are reaching full capacity grower groups



Section B: Information and Communications

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 ■ Government
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 ■ Wholesaler



B.7 The AGM and the Townhall sessions, provide a good opportunity to receive information and discuss important issues

- 73% of the total respondents either agree or somewhat agree that the AGM and the Townhall sessions, provide a good opportunity to receive information and discuss important issues

How can the Commission improve AGM and townhall sessions?

Prioritize the agenda and take questions at the end of the session/ have a time limit on Q&A

Provide more incentives for producers to attend

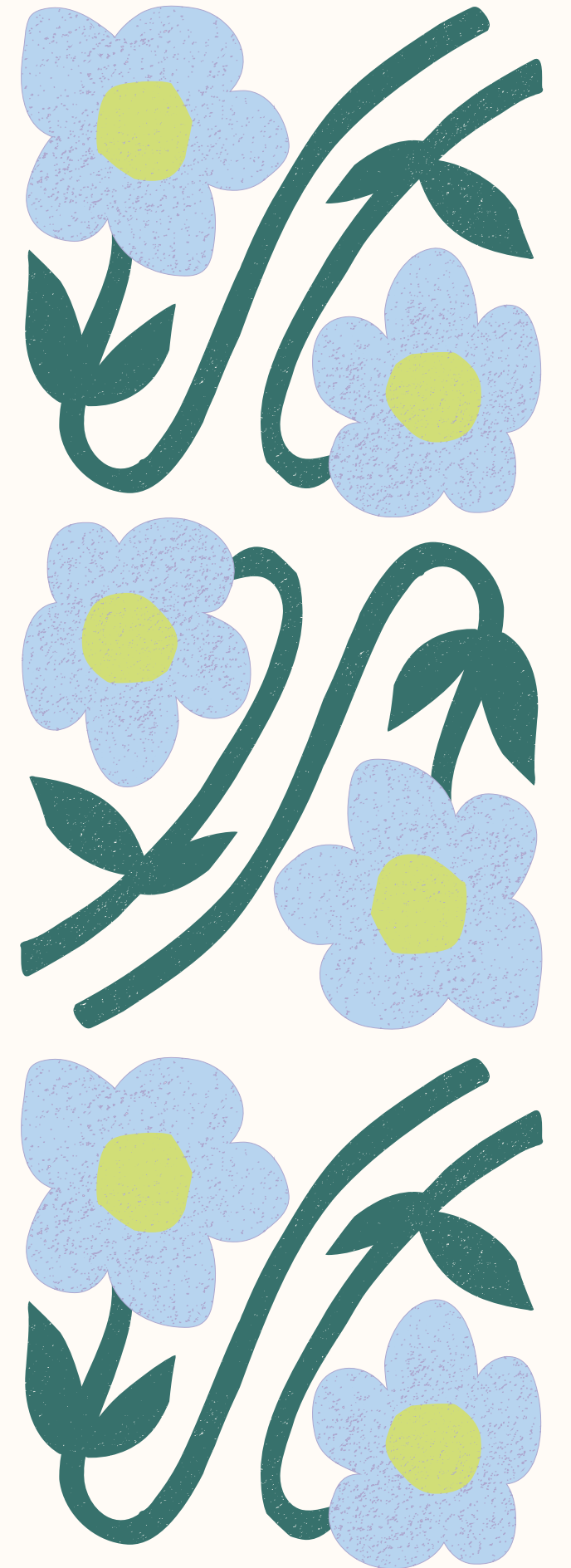
Dates should not conflict with other major industry events

Email the presentation or information before the meeting to follow along.

Don't let a few participants dominate the conversations, focus on key initiatives

Keep up the format of table discussions as a way of getting insights from stakeholders about issues

The AGM and townhall meeting were long enough, having additional Townhall meetings



Section C: Going Forward

C.1 What do you perceive to be the Commission/Industry's strengths/weaknesses?

Strengths

- The intent of the entity is good as it is supposed to be working for the growers
- Grower knowledge.
- Regulation of prices and production
- Review of general orders clarifying definitions
- To prevent oversupply from collapsing prices
- Having industry members on the board as well as outside directors
- To do what is mandated and uphold the system that is place
- Ability to sit down with all growers and have open discussions
- It is better to help producer for finding leased properties and access to equipment
- Provide more information about farming land, pesticides, regulation
- Provide a level of protection to the investments that growers make in BC
- Bringing in independent members

Weaknesses

- Far too regulated and are at times unable to move forward with a decision
- Becoming too litigious and bureaucratic.
- To many growers growing regulated storage crops, existing growers aren't able to move product
- Communication with full grower groups
- Not changing fast enough with the time and the needs of the industry
- Sometimes slow to help new entrants with delivery allocation.
- Lack of new entrants; labor shortages
- Need to ensure compliance with regulatory requirements in best interests of all
- Regional production decisions need to be managed separately and exclusively by a group focused solely on each respect industry. The resulting friction and litigation has created an environment that repels participants and has resulted in high legal costs passed on through industry levies.
- Not listening to the small producers needs relying too heavily on agencies needs and agenda

Section C: Going Forward

C.1 What opportunities/threats do you see for the industry that may arise over the next 2 to 3 years?

Opportunities

- Partnership with agrotechnology projects to carry out research and commercialization leading to improved productivity, modernization of operations and growth opportunities
- Innovation to adapt to climate change and introduce robots and automation to the industry
- Defending the potato anti dump in 2025 and to solidify our enforcement of the NMPA
- Strong leadership will be required.
- Bring more structure to the regulatory environment
- Public awareness of and benefits of food security reduced carbon footprint
- The marketplace is changing, and the commission needs to do the same
- Working for the growers as the population increases
- Commission enforcement of compliance with requirements (esp. agencies) will improve opportunities for producers
- Increased support for and participation in buy local initiatives from Government
- Ability to expand to new markets and control inner province pricing
- Public trust for Agriculture. Take part in marketing product into school food programs now expanding with BC Agriculture in the Classroom

Threats

- Climate change and small producers being forced out by industry giants
- Input cost and regulation
- WEF agendas and foreign acquisition of BC farmland.
- Increased expansion and competition from Alberta
- More and more agencies and new growers trying to flood market with more product
- Continued infighting and fragmentation within industry (e.g.: greenhouse vs. storage crops) which weakens both.
- Retirement age of a lot of growers. No one to replace them.
- Increased cost of production and reduction in market share due to more centralized distribution by the major retailers.

Additional Comments

MOST IMPORTANT THINGS THE COMMISSION COULD DO TO STRENGTHEN THE INDUSTRY OVER THE NEXT YEAR



1

Continue to make sure what is being done for one group is being done for the other .The rules should apply for the storage crops and greenhouse crops the same

2

Agency Accountability Communications on how the Commission creates value for producers and industry

3

Have an anonymous tip line for producers to tell you what needs to improve

4

Encourage new growers to enter the industry and make sure they can succeed within the agency they choose.

5

Small producers feel they are not getting a fair share of the revenue.

Thank you!

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