

# **Farming for the Future**

## **Nova Scotia Organic Sector Strategic Plan**

**Draft 2a**

**August 28 2012**

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## Executive Summary

## Introduction

This strategic plan for Nova Scotia's organic sector was initiated in 2010 in response to....

## Industry Profile

There were 3,713 certified organic farms in Canada in 2011, up from 3,555 farms in 2006. Nova Scotia had only a tiny proportion of those farms. There were 44 certified organic farms in Nova Scotia, a significant decrease from the 61 farms that were certified organic in 2006. Of the 44 farms that were certified organic in 2011, the majority (36) were producing organic fruits, vegetables or greenhouse products. There were 12 producing organic hay and field crops, and 12 producing organic herbs, spices, and garlic products. Ten farms produced organic livestock and two produced organic maple products. While there were declines in the number of certified organic farms in each product category, the greatest decline was in the organic fruit, vegetable and greenhouse category, down from 50 farms in 2006. Nevertheless, the organic farming sector in Nova Scotia continues to show a strong horticultural focus.

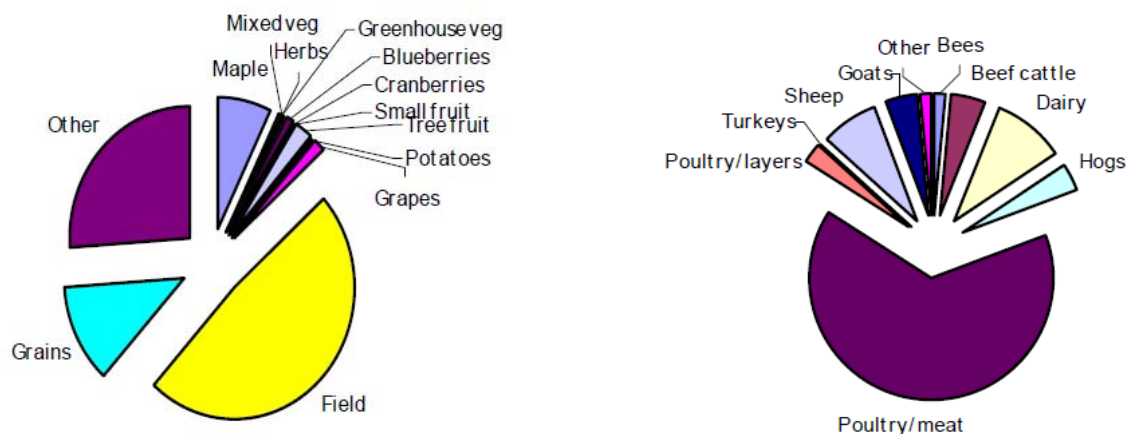
### Organic Farms and Products in Nova Scotia

Number of organic farms selling (# in brackets = farms in transition to organic)	2011	2006
Hay or field crops	12 (3)	16 (5)
Fruits, vegetables or greenhouse products	36 (14)	50 (6)
Animals or animal products	10 (5)	12 (5)
Maple products	2 (0)	3 (0)
Herbs, spices or garlic	12 (4)	Not collected
Other organic products	4 (2)	Not collected
<b>Total number of farms with organic products for sale</b>	<b>44 (19)</b>	<b>61 (14)</b>

Source: Statistics Canada, 2011 Census of Agriculture

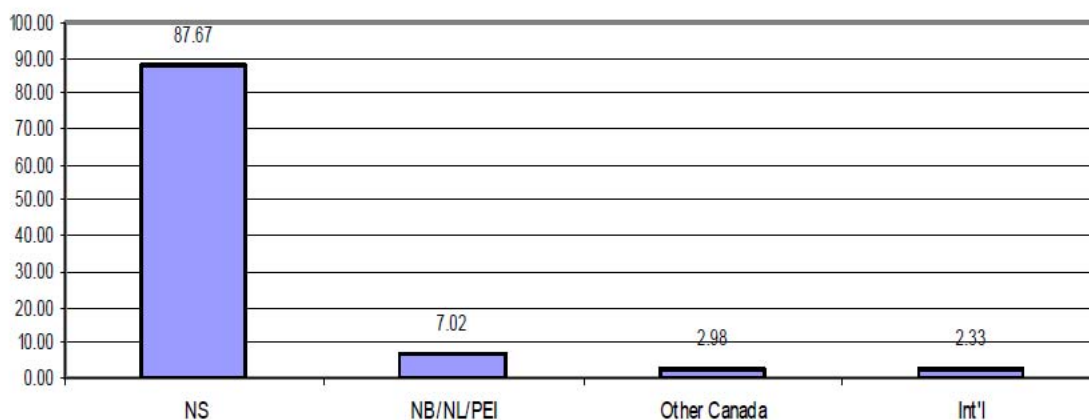
A survey of the organic sector was conducted in 2010 by two of the Nova Scotia Department of Agriculture's marketing specialists: Andrew Knight and Claire Hanlon-Smith. There were 87 responses to the survey, of which 61 reported being certified organic or in transition to organic. Some of these farms had been organic for several decades, but nearly 2/3 had become organic in the previous ten years (since 2000). Of the 61 organic farms in the survey, 90% were certified organic and nearly all reported that they intended to remain involved in certified organic production for the next two years.

The 2010 NSDA sector survey further broke down the crops and livestock produced by certified organic farms, as represented by the following pie chart graphs:

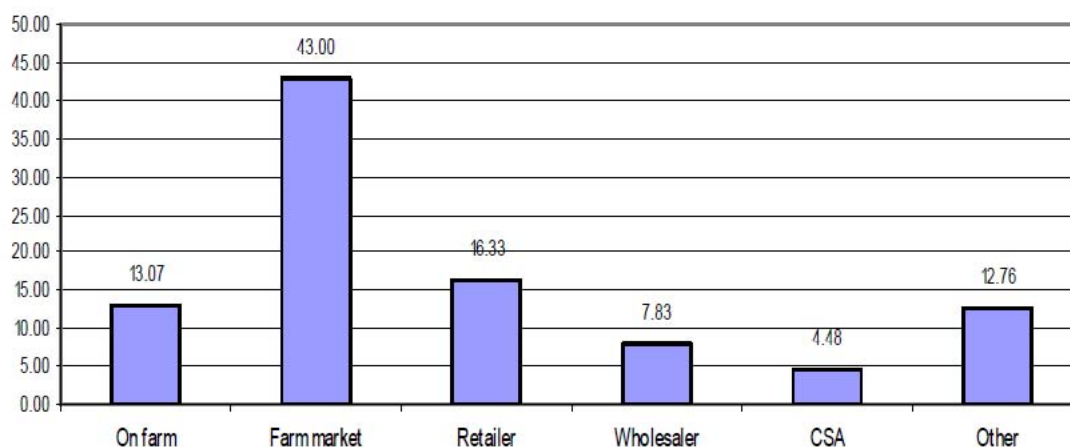


Over three-fifths of respondents stated that they are involved in food products/manufacturing. Less than one-third stated that they were involved in non-food product manufacturing and processing. Close to forty percent were involved in distribution, repacking or reselling, and almost two-thirds reported being involved in some value-added activity. This indicates that there is strong focus on value-adding and market focus within the organic sector. When asked what support/resources would be of most use, the top answers were on-farm processing and commercial kitchens, followed by abattoirs and business counselling.

Over 85% of respondents reported selling their products exclusively in Nova Scotia.

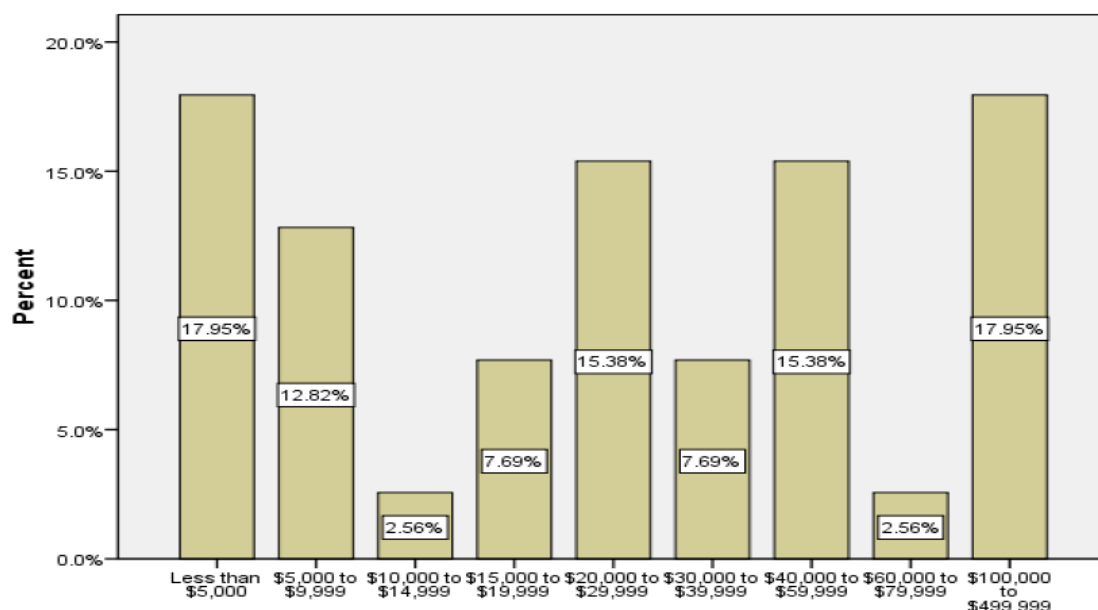


Organic producers were most likely to rely on direct sales to market their products, with 26.8% selling through farmers' markets and 23.8% selling from the farmgate. Some farmers also sold to wholesalers, retailers or operated Community Shared Agriculture programs. Most farmers reported selling via multiple channels.



Respondents were asked to rate how their customers perceived numerous factors when buying their products. The three most important factors were no pesticides/hormones/antibiotics, followed by local and knowing/meeting the producer. Just over two-thirds of respondents reported that they received a premium for their certified organic products in 2009.

Regarding farm profitability, just over two-fifths of organic producers stated that their certified organic operations lost money in 2009, while almost two-fifths indicated that their operations made a profit. Gross sales ranged from less than \$5,000 to the \$100,000 – 499,999 category. Seventy percent of respondents were planning to expand their operations, almost entirely through increased sales in Nova



Scotia.

There was strong support among respondents (73%) for provincial regulation and enforcement of organic regulations. Additionally, 58.7% stated the Canadian Organic Products Regulation will have a positive effect on the organic industry, while 26.1% thought it would have a neutral effect and 15.2% thought it would have a negative effect. The three most cited concerns with current organic certification regulations were the cost of certification, the misrepresentation of organic products, and a lack of enforcement.

#### **Estimated Certified Organic Farms/Processors in Nova Scotia (2012)**

<b>Certifying Body</b>	<b>Primary Producers</b>	<b>Processors</b>
Atlantic Certified Organic (ACO)	35	7
Ecocert Canada	2	0
Pro-cert	7	5
Quality Assurance International (QAI)	0	2
<b>Total</b>	<b>44</b>	<b>14</b>
<p><b>Sources:</b> List of Operators Subject to Organic Control (LOSOC) (ACO and Ecocert)  <a href="http://www.losoc.info/losoc_RechercherEntreprises_GrandPublic_En.do">http://www.losoc.info/losoc_RechercherEntreprises_GrandPublic_En.do</a> (accessed June 29, 2012)</p> <p><a href="#">Certified Client List of Operators Located in Canada with Products in Compliance to the Canadian Organic Regime (COR)</a> (Pro-cert)</p> <p>Quality Assurance International Product Search: <a href="http://www.qai-inc.com/listings/listings_results.asp?State=Nova%20Scotia&amp;Country=CAN&amp;SearchType=ADVANCE&amp;SortHeader=name&amp;SortType=desc&amp;PreSort=prod_name&amp;">http://www.qai-inc.com/listings/listings_results.asp?State=Nova%20Scotia&amp;Country=CAN&amp;SearchType=ADVANCE&amp;SortHeader=name&amp;SortType=desc&amp;PreSort=prod_name&amp;</a></p>		

#### **Planning Process**

The process of developing a strategy for the provincial organic sector was initiated in 2010. A small steering committee led by the Organic Council of Nova Scotia (OCNS) and industry members, in partnership with the Nova Scotia Department of Agriculture (NSDA) was created to oversee this process.

The first step in the process was the development and distribution of a survey to the organic sector in Nova Scotia. NSDA sent out surveys to current and past organic operations (approximately 130 surveys) with 87 surveys being returned. Of these, 61 reported being either certified or in transition to become certified organic. In December 2010, NSDA presented results of the survey to the steering committee.

The Kings Regional Development Agency (KRDA) provided assistance in moving the strategic planning process forward. Three regional sector meetings were held in Kentville, Cornwallis and Truro during April 2011. Survey results were formally presented and the sector was asked to identify the primary issues to be addressed in a strategic plan. In May 2011 an expanded steering committee met, discussed next steps and consolidated the key areas that arose from the regional meetings.

In November 2011, a meeting was held to validate and prioritize the five key result areas that had been identified in May 2011. A strategic report was drafted and circulated to members of OCNS for review and corrections and an industry meeting was held to review the key strategic areas on January 26, 2012. The data gathered at these various sessions and meetings were then compiled into a strategic plan, circulated once more to OCNS members for review, and finalized.

### **Goals/Performance Measures**

During the consultation process, three key goals were identified for the industry to focus its efforts on. These goals reflect the organic sector's vision of itself and the vision it wishes to project to the rest of the farm community and Nova Scotia society.

- A sustainable sector characterized by cooperation, prosperity, expertise, and the passing on of farms and farming knowledge to the next generation

In order for the organic farming sector to be sustainable, Nova Scotia farmers need to develop their level of expertise in production, business, marketing, and education. Several organic farmers in the province have already attained a high level of expertise in their fields. The sector must also speak with a unified voice. It is essential for the prosperity of organic farmers in Nova Scotia, as well as for the integrity of the organic brand, that organic farmers embrace old and new methods of cooperating with one another. Furthermore, to ensure sector sustainability, established farmers must prepare themselves to facilitate the passing on of their farms, equipment, and expertise to the next generation of organic farmers in the province.

- A strongly branded sector that produces safe, healthy food that meets consumers' demands

As food contamination scares become regular media fare, consumers are looking for safe, healthy food. In addition, the organic sector in Nova Scotia is riding the wave of the Buy Local movement. There is growing demand for locally-processed products that the sector currently lacks the infrastructure capacity to fully meet.

- A sector that is supported by society, including consumers, other food and agriculture sectors, and government

Organic farming is no longer a fad or a niche. Organic farmers are not fringe hippies. Organic consumers are not confined to well-heeled foodies. Organic is now reaching a broad sector of farmers and consumers. As the sector comes of age, there is a strong and growing desire for the sector to be taken seriously for its contributions to the industry and society as a whole.



There needs to be greater acknowledgement of the contribution that the organic farming sector is making in promoting and providing healthy food. In addition, organic farmers need to support and be supported by farmer and commodity organizations and government programs, including those offered by the Department of Agriculture and others. This may mean modifications to existing programs to suit the scale, diversity and soil health emphasis that are characteristic of organic farms in the province.

### **Key Result Areas (In Order of Priority)**

#### **1. Technical Assistance (Extension, Production, Marketing, Research)**

Strategic Priorities:

- Increase access to technical information (production and business)
- Increase understanding of resources available to the organic sector

Technical assistance is currently provided to organic farmers in Nova Scotia by a number of organizations:

- Perennia has one dedicated organic specialist, Dr. Av Singh. In addition, most of the other commodity specialists work with organic producers.
- The Atlantic Canada Organic Regional Network has a transition specialist located in Nova Scotia. Additionally, ACORN conferences, webinars, workshops, and websites are valuable sources of information.
- The Organic Agriculture Centre of Canada is headquartered in Bible Hill at the Nova Scotia Agricultural College.
- The Department of Agriculture provides some technical support to organic farmers.
- The Kentville Research Station does research on organic horticulture.
- There are also hired consultants who do work for organic farmers in Nova Scotia.

Despite this seemingly impressive list of local resources, technical support for organic farmers is still falling short of what's needed. There is a need for more regionally-appropriate research and extension resources. In addition, there is a need for more training and support for new organic farmers and better facilitation of peer-to-peer networking.

**Action Item 1.1** Pursue a single website portal for organic production information.

This website would appropriately be coordinated through Perennia or the Organic Agriculture Centre of Canada. Gaps in locally-appropriate information could be identified and then filled by researchers or extension workers. This could conceivably be part of a regional initiative, to serve the needs of organic farmers in Atlantic Canada, in which case ACORN might be a suitable host organization.

**Action Item 1.2** Create a new farmer package.

While resources are currently provided through the Department of Agriculture's THINKFARM Program and ACORN's new Grow a Farmer Program, several pieces of the new farmer support package are missing. Primarily, it is key to have an incubator farm in the province that provides training and eases aspiring farmers into farming, allowing them to build their production and business skills before having to carry the costs of a farm mortgage.

**Action Item 1.3** Facilitate peer to peer networking.

The organic sector currently lacks the capacity to facilitate this type of network. Organizational support is needed. Peer to peer networking could take the form of online networking (e.g. Facebook group or email group), conference calls, kitchen meetings, or annual events.

**Action Item 1.4** Establish a mentoring program for new organic farmers.

A formal mentoring program for new organic farmers (both new to farming and new to organic) would help support these new farmers through some of the difficulties associated with transition.

**Action Item 1.5** Develop on-farm workshops and tours.

It is expected that Perennia would take the lead on this, devoting more resources to extension support for organic farmers and processors. Dr. Av Singh has been invaluable to the organic sector in the province. Additional extension specialists or more training for existing subject matter specialists regarding organic practices would provide a great boost to the industry.

## **2. In-province Regulation**

### **Strategic Priorities**

- Enforcement of the organic regulation within Nova Scotia (intra-provincial)

While the Canadian Food Inspection Agency is tasked with enforcing organic certification and labeling for products sold interprovincially, there is currently no regulation around the use of the term "organic" for Nova Scotian products sold in Nova Scotia. This essentially means that for producers who do not sell outside of Nova Scotia there is no regulatory "stick" to enforce certification. Neither is there a regulatory "carrot" of market recognition since producers can use terms like "organic", "natural", "spray-free", and "pesticide-free" with legal impunity. Certified organic producers, therefore, are not operating in a level playing field. The creation and enforcement of regulations around organic claims would level the playing field for certified producers.

**Action Item 2.1** Have a provincial government policy that "organic" means "certified organic."

This would be enforced in provincial government food procurement policies and any government-sponsored farm promotion tools, such as Open Farm Day and Select Nova Scotia.

**Action Item 2.2** Establish enforcement at farmers' markets.

Farmers' markets are one of the grayest areas for consumers. While certified organic growers do generally display their certificate, it is often not prominent or noticed by consumers. Many consumers assume that all farmers' market vendors are organic. Some organic vendors were formerly certified but have allowed their certification to drop without necessarily changing their signage, having established their reputation among consumers.

**Action Item 2.3** Lobby government for intra-provincial enforcement.

Farmers' markets are not the only place where organic confusion exists. There ultimately needs to be a provincial regulation enforcing the use of the terms 'organic' and 'certified organic' and the national organic standard. The regulation should apply equally to direct-sale outlets, restaurants, and third-party retailers. There are a number of mechanisms by which the regulation could be enforced, such as utilizing existing provincial food safety specialists, partnering with the Canadian Food Inspection Agency, or assigning the work to a designated inspector.

### **3. Marketing and Branding**

#### Strategic Priorities

- Increase the marketing capacity of the sector and individual businesses within the sector, including distributors
- Development/adoption of an organic brand promise

In line with intra-provincial regulation and enforcement of certification as a prerequisite for the use of the term "organic", there is confusion among the public regarding what organic means. While "organic" has a great deal of cachet among consumers who are motivated by environment, health, and/or animal welfare concerns, Buy Local messages have caught on largely with the same consumer group and many do not distinguish between "organic" and "local". Particularly at farmers' markets, farmers who would be eligible for organic certification but have chosen not to and even farmers who would not be eligible for organic certification are able to take advantage of this organic brand confusion to gain market share and price premiums. In addition, some farmers, particularly new farmers, find the cost of certification to be a barrier. Some livestock producers find the cost of organic feed to be prohibitive as they are unable to fully pass those costs on to consumers.

It is clear that in addition to regulation and enforcement, there needs to be a marketing strategy around what "organic" means and how to identify it in the marketplace. Canadian Organic Growers (COG) is working on such a strategy around the Canada Organic logo and Nova Scotia should partner with COG to make sure that this campaign has high visibility in the province.

**Action Item 3.1** Encourage use of Canada Organic logo.

Certified organic farms in Nova Scotia should be using the logo on their websites, signage, labels, sell sheets, and any other marketing material that they have. A coordinated effort strengthens the brand for everyone.

**Action Item 3.2** Focus on building awareness of the Canada Organic brand.

End-use consumers and food purchasers need to be aware of the importance of the Canada Organic brand and the quality assurance it provides in terms of organic production methods. COG continues to do this kind of promotional work and Nova Scotia should facilitate a strong provincial presence, including the promotion of Organic Week.

**Action Item 3.3** Engage in a regional dialogue on marketing and distribution.

In order to place local, organic food in large retail outlets in a meaningful way, organic farmers need to work together on a regional basis. Food safety considerations will be of paramount importance in accessing these larger markets.

**Action Item 3.4** Develop a full marketing strategy.

Marketing specialists should be engaged to assist the sector to develop messaging, images, and marketing templates that can then be used by individual farmers and processors. This will help the sector present a consistent front to consumers and will strengthen the province's organic brand.

#### **4. Public Education**

Strategic Priorities:

- Increase consumer understanding and awareness of organic
- Increase awareness of organic in health care professionals, educational institutions (professionals and students), youth organizations

Many consumers no longer make the connection between food and health and farmers find themselves in the unaccustomed role of home economists and educators in order to increase consumer acceptance of their products. The organic food sector should be a key contributor in work to improving health outcomes in Nova Scotia. Therefore, consumers need additional education but education also needs to be extended to community organizations, health care providers, and the staff of relevant government agencies. Organic farmers also need training and coaching in communication skills and messaging so that they can deliver a strong and consistent message about the benefits of eating organic.

**Action Item 4.1** Identify gaps in consumer knowledge and existing resources to address those gaps.

Many consumers lack basic food storage, preservation, preparation, and cooking skills, as well as basic nutritional knowledge. Public health officials have already identified several of these gaps and come up with some innovative educational solutions that the organic farm community can tap into.

**Action Item 4.2** Work with organic farmers on communication skills and messaging.

With a great deal of conflicting information in the popular media regarding the health benefits of food in general and organic food in particular, it is important for organic farmers to have the ability to communicate accurate and consistent messages about their products. This type of training could be included as part of the full marketing strategy described in Action Item 3.4.

**Action Item 4.3** Explore collaboration with a variety of groups such as health care professionals, educational institutions, youth organizations, and government personnel.

Organic farmers cannot spread the message alone. However, there are a wide variety of people and groups that are interested in purchasing and promoting organic food and the skills needed to use it. The organic farm sector in Nova Scotia should increasingly engage and partner with these individuals and groups to communicate to the public about organic farming, the organic certification program, and the benefits of consuming organic food.

## 5. Certification

Strategic Priorities:

- Increase the accessibility and affordability of organic certification
- Increase the number of certified producers and processors

Organic certification is in a crisis state in Nova Scotia. According to the 2011 Census of Agriculture, there were 44 certified organic farms in Nova Scotia, with 19 farms in transition to organic. This is a 28% decline from the 2006 Census, when 61 farms in the province were certified organic and 14 were in transition. Certified organic farms currently represent 1.1% of all census farms in Nova Scotia. Meanwhile, 2% of farms on a national scale are certified organic.

The census data show that the province's certified organic farms are concentrated in the horticulture sector and this is the sector that has seen the largest decline, from 50 farms in 2006 to 34 farms in 2011. The province also has 10 certified organic livestock operations, down from 12 in 2006, and 2 certified organic maple operations, down from 3 in 2006.

The reasons for the decline in the number of certified organic farms could include factors unrelated to the certification process. For example, these farms could have gone out of business or the farmers retired. However, anecdotal evidence suggests that most of these farms are still in business and employing the same production practices as previously but are choosing not to certify themselves as organic. The primary reasons for this are:

- The cost of certification is prohibitive or not seen to add enough value to the farm business to cover the cost
- Certification is not necessary to gain the price premium associated with organic because of strong customer relationships or consumer assumptions (e.g. that everyone at the farmer's market is organic)
- The records required for certification are onerous.
- A lack of faith in the certification process, which depends on farmers being honest in their record keeping, as well as the skill and knowledge of the inspector or certification body.

Despite these (perceived) disadvantages, the organic certification program remains the organic sector's best and most trusted tool for quality assurance with consumers. The organic standards recognize a body of best management practices for farming that reduces environmental impacts, maximizes animal welfare, and tries to work with natural systems. It is important that the still fledgling certification process be supported until it gains full recognition by food processors, food retailers, and consumers.

**Action Item 5.1** Lobby government for cost sharing of certification.

The governments of New Brunswick and Prince Edward Island already subsidize organic certification costs. This places Nova Scotia farmers at a disadvantage within the region in terms of encouraging conventional farmers to transition to organic and strengthening the certification program. Such a cost share program would be highly useful until the number of certified farms reaches a level that the certification program becomes self-sustaining and the economic benefits of certification are more widely realized, allowing farmers to shoulder these costs alone.

**Action Item 5.2** Increase understanding of the value of certification.

This could be done through peer education and testimonials from farmers and processors about how the certification process has enhanced their business.

**Action Item 5.3** Create linkages between existing farm planning tools, like Environmental Farm Plans and Nutrient Management Plans, and organic certification.

Greater linkages between these various programs would decrease the record-keeping burden that all farmers currently face, but which is all the greater for certified organic farms. These linkages would also enhance the utility of each of these plans, through synergies that create value to the farmer greater than the sum of its parts. A template for linking these plans would need to be developed in partnership with the various program coordinators.

## Implementation Plan

1. Key Result Area: Technical Assistance (Extension, Production, Marketing, Research)				
Strategic Priorities	Action Items	Outcomes		Indicators
		Short Term	Medium Term	
Increase access to technical information	Pursue a single website portal for organic production information.	Website is developed	Website is kept up to date and information resources are expanded	Number of hits to website; survey of users
	Create a new farmer package.	Comprehensive training is available for new organic farmers	New organic farms become established in Nova Scotia	Assign a target number here?
	Facilitate peer to peer networking.	Networking mechanisms are established (eg email groups, webboards, face-to-face)	The network continues to be active and grows in membership and depth of sharing.	Greater unity and cooperation among organic farmer, larger shared knowledge base
Increase understanding of resources and services available to the organic sector	Establish a mentoring program for new organic farmers.	A mentorship coordination mechanism is created	New organic farmers gain confidence and are more successful or become successful more quickly	# of new organic farms/farm profitability
	Develop on-farm workshops and tours.	There are more educational opportunities for organic farmers	There is an increased level of expertise within the organic farm community	Improved farm production/business management/marketing techniques

<b>2. Key Result Area: In-Province Regulation</b>				
Strategic Priorities	Action Items	Outcomes		Indicators
		Short Term	Medium Term	
Enforcement of the organic regulation within Nova Scotia	Have a provincial government policy that “organic” means “certified organic.”	A Department of Agriculture policy is enacted.	A province-wide policy is enacted.	Policies and adherence to policies.
	Establish enforcement at farmers’ markets.	Farmers’ markets create policies around acceptable signage and standard definitions	Policies are enforced	Food descriptors (e.g. organic, transition, natural, pesticide-free) are used consistently at farmers’ markets in a way that is clear to consumers
	Lobby government for intra-provincial enforcement.	Legislation is passed to enforce the national organic standard intra-provincially	Regulations are enacted and inspectors are assigned to enforce the regulations	Legislation, regulations



<b>3. Key Result Area: Marketing and Branding</b>				
Strategic Priorities	Action Items	Outcomes		Indicators
		Short Term	Medium Term	
Development/adoption of an organic brand promise	Encourage use of Canada Organic logo.	The logo is more commonly seen on Nova Scotia products	The logo is displayed on the signage and labels of all organic products in Nova Scotia	Visibility of logo
	Focus on building awareness of the Canada Organic brand.	Organic Week is more widely celebrated and promoted in Nova Scotia	Consumers understand the Canada Organic brand promise	More consumers know what organic means and where to find it
Increase the marketing capacity of the sector and individual businesses within the sector, including distributors	Engage in a regional dialogue on marketing and distribution.	Groundwork is laid for the development of marketing and distribution mechanisms.	Marketing and distribution mechanisms are established.	Locally grown organic products are widely available.
	Develop a full marketing strategy.	Marketing strategy is developed.	Marketing strategy is implemented.	Consumers seek out Nova Scotia organic products.

4. Key Result Area: Education				
Strategic Priorities	Action Items	Outcomes		Indicators
		Short Term	Medium Term	
Increase consumer awareness and understanding about organic	Identify gaps in consumer knowledge and existing resources to address those gaps.	Consumer survey of understanding of organic food and farming, including storage and preparation	A consumer education strategy is developed	Consumer understanding of organic food and farming is improved
	Work with organic farmers on communication skills and messaging.	Organic farmers receive training in communication skills	The organic sector develops consistent messaging for use with the public	Organic farmers are better able to communicate with the public, especially the media
Increase awareness of organic in health care professionals, educational institutions, and youth organizations	Explore collaboration with a variety of groups such as health care professionals, educational institutions, youth organizations, and government personnel.	A pilot project is established	The pilot collaboration is expanded to other institutions/groups	Health care professions, youth organizations, educational institutions and government personnel are supportive of and possess accurate information about organic food and farming.

5. Key Result Area: Certification				
Strategic Priorities	Action Items	Outcomes		Indicators
		Short Term	Medium Term	
Increase the accessibility and affordability of organic certification	Lobby government for cost sharing of certification.	A certification fee subsidy is set up.		The number of certified organic farms increases
Increase the number of certified producers and processors	Increase understanding of the value of certification.	Case studies or testimonials of certified organic farmers are used to promote certification to other farmers	The value of certification continues to be monitored and case studies/testimonials gathered	The number of certified organic farms increases
	Create linkages between existing farm planning tools, like Environmental Farm Plans and Nutrient Management Plans, and organic certification.	Preliminary work is done to catalogue where overlap and divergences exist among the various plans	A formal collaboration is created among a certifying body, a Nutrient Management Planner, and/or the Environmental Farm Plan Program to share and accept information from each other in order to meet the requirements of each program	Certified organic farms are able to more easily meet the requirements for an Environmental Farm Plan and/or Nutrient Management Plan, or vice versa

**Next Steps for Implementation (this section will need a bit more work)**

The sector in Nova Scotia currently lacks the organizational and financial capacity to implement this strategic plan without administrative support. A possible option for implementation would be to partner with the Atlantic Canada Organic Regional Network (ACORN), as was done in New Brunswick, to take advantage of the organizational support they can provide. This would help the sector in providing support, energy and resources towards the advancement of the organic strategic plan and sector in Nova Scotia.