High-Level Recommendations on the Direction of the Next Policy Framework

Building Resilience Across the Canadian Agriculture and Agri-Food Sector

Canada's agriculture and agri-food sector is navigating an increasingly complex operating environment shaped by climate change, rising input, labour, and energy costs, growing consolidation, and difficult generational renewal. Recent geopolitical uncertainty, trade instability, and supply chain disruptions have further underscored the importance of reliable domestic production capacity, reduced dependence on imported food and agricultural inputs, and diversified farming systems that can deliver on food security and affordability for Canadians.

The Next Policy Framework (NPF) presents a critical opportunity to strengthen strategic independence, long-term resilience, competitiveness, and sustainability across the sector.

This submission draws on perspectives from farmers, agri-food businesses, and organizations across the agricultural, environment, and food system. The challenges described, and the need for systemic solutions can be applied across the Canadian agriculture and agri-food sector.

These comments are intended to inform the early stage of NPF consultations. More detailed recommendations on program design will be presented in subsequent phases of consultations.

We recommend that the NPF:

1. **Adopt long-term resilience as the overarching objective** guiding policy and investments through the NPF.
2. **Recognize and utilise organic agriculture (including aquaculture) and food as one strategic, cross-cutting pathway to deliver on resilience**, competitiveness, sustainability, and sector renewal. To scale these impacts from organic agriculture, the NPF should include a development strategy for organic food and farming.

Resilience as an Overarching Objective

Agriculture is central in supporting Canada's broader cross-sectoral policy priority to move "from reliance to resilience."[1] Resilience in agriculture reflects the capacity of farms, processors, and supply chains to manage risk, adapt to change, remain economically viable, and strengthen competitiveness over the long-term.[2] As an overarching objective, resilience is an imperative and brings coherence to priorities related to markets and trade, growth and competitiveness, science and innovation, labour and workforce development, and sustainability. Strengthening

[1] Agriculture and Agri-Food Canada. 2025. From Reliance to Resilience: Budget 2025 delivers new investments to Buy Canadian and build Canada's industrial strength. https://www.canada.ca/en/agriculture-agri-food/news/2025/11/from-reliance-to-resilience-budget-2025-delivers-new-investments-to-buy-canadian-and-build-canadas-industrial-strength.html.

[2] This paper draws on the OECD definition of resilience, aligned with Agriculture and Agri-Food Canada's use of this definition in the NPF context: "The ability to prepare and plan for, absorb, recover from, and more successfully adapt and transform in response to adverse events." OECD (2020), Strengthening Agricultural Resilience in the Face of Multiple Risks, OECD Publishing, Paris, https://doi.org/10.1787/2250453e-en.

this capacity will require moving beyond predominantly reactive risk management approaches toward more proactive, system-level approaches. As OECD identifies in its report on resilience and review of Canada's agricultural policies, resilience requires longer-term thinking, and shift of policies and incentives towards more transformative advancements, including those that reduce long-term risk exposure and increase preparedness.[3]

Strengthening resilience also ensures the reliability of Canada's food system in an increasingly uncertain global environment. Production and supply chains that are less vulnerable to external input shortages, price volatility, and trade disruption are better positioned to maintain food security in Canada.

For the NPF, resilience must be considered across three interconnected critical dimensions:

- **Economic resilience**: the ability of farm and agri-food businesses to maintain competitiveness, improve profitability, reduce input dependencies, and manage volatility.
- **Environmental resilience**: the capacity of agricultural systems to adapt to climate change pressures and ecological stress, and maintain productivity through soil health, biodiversity, and locally available nutrients.
- **Social resilience**: the ability of farmers, workers, businesses, and communities to sustain livelihoods, wellbeing, and generational continuity.

These dimensions are mutually reinforcing and all necessary for a resilient agri-food sector. They require coordinated policy approaches that work together across production, processing, markets, and people. Framing the NPF through a resilience lens would support a more coordinated approach, reflecting the diversity of Canadian agriculture while strengthening the underlying capacity of the sector.

Organic Systems as a Strategic Opportunity

An intentional focus on strategic supply chains and sectors that provide multiple benefits across economic, environmental, and social objectives can accelerate the development of agri-food resilience.

Organic systems provide a strategic opportunity to, as the OECD recommends, move beyond reactive approaches, advancing transformative solutions that reduce and eliminate risks. We propose that the NPF develop and scale sustainable organic production systems that eliminate some vulnerabilities **altogether**, while deeply mitigating others.

At the farm level, organic systems embed risk mitigation and resilience directly into farm management. Organic systems:

- **Reduce dependence on external inputs,** including fossil-fuel based pesticides and synthetic fertilizers, lowering vulnerability to input price volatility, supply disruptions, and geopolitical shocks.

[3] OECD (2020), Strengthening Agricultural Resilience in the Face of Multiple Risks, OECD Publishing, Paris, https://doi.org/10.1787/2250453e-en.

- **Enhance soil health and ecological function**, improving water retention and resilience against flooding, drought, and other extreme climate events, while improving nutrient efficiency and cycling.
- **Ensure diversity in crop and livestock production**, reducing exposure to market and production shocks while harvesting nutrient benefits.

At the same time, organic farmers leverage these on-farm benefits into higher premiums, differentiated market channels, domestic and export opportunities, and consumer trust in the market. Across the value chain, Canadian organic producers and processors operate within a national regulatory framework according to third-party verified standards and access high-value markets supported by international trade equivalency arrangements with 35 countries, facilitating access to over 90% of the global organic market.[4]

Organic is an established, multi-scale national sector with strong potential for growth across agriculture, aquaculture, processing, and value-added food production. Organic farms already steward 2.61 million acres of farmland, with more than half located in the Prairies.[5] The sector includes nearly 6,000 producers and 1,600 processors operating across all provinces and diverse production systems.[6] Production is broadly distributed across grains and oilseeds, horticulture, other crops, and livestock production, reflecting a scalable opportunity.[7] The sector spans commodities, regions, and farm sizes, supplying a wide range of products and ingredients for value-added foods and beverages in both domestic and export markets.

How organic contributes directly to core NPF policy outcomes and objectives:

Economic Resilience:

- **Competitiveness:** Organic can improve farm net returns, reduce input dependence, and position Canadian farmers and food companies in high-value markets.[8]
- **Markets and Trade:** Organic can support trade growth, diversification, and new market opportunities for Canadian crops and livestock through strong domestic and global demand, internationally recognized standards, and access to differentiated markets. Organic standards also enable compliance with strict import requirements in key jurisdictions, providing Canadian producers with a recognized pathway to maintain and expand market access.

Environmental Resilience:

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[4] See Appendix 2 below for further detail on the Canadian Organic Standards and organic trade equivalency arrangements.
[5] Canada Organic Trade Association. Production Data. Accessed April 15, 2026. https://canada-organic.ca/en/what-we-do/data-research/production-data.
[6] Canada Organic Trade Association. Production Data.
[7] According to the 2021 Census of Agriculture, 26% of organic farms operate primarily in grains and oilseeds, 22% in horticulture, 32% in other crops, and 21% in livestock production. Statistics Canada. 2021. Census of Agriculture.
[8] A 2025 evidence synthesis finds that organic crops can be twice as profitable, and that tripling organic acreage in Canada could generate $1.73 billion in additional farm net returns. Canadian Organic Growers. 2025. Cultivating the Organic Opportunity for Canadian Farmers and Consumers: Economic and Environmental Impacts of Organic Agriculture and Policy Recommendations for Canada. Canadian Organic Growers, Ottawa, ON. https://cog.ca/policy/organic-task-force/.

- **Science and Innovation:** Organic systems can drive continuous, systems-based innovation in agronomy, soil management, and biologically-based practices for fertility, pest, and weed management – advancing sustainability and best practices across the broader agriculture sector.[9]
- **Sustainability:** Organic can sustain soil health, protect biodiversity, and reduce greenhouse gas emissions, strengthening resilience to climate shocks.[10]

Social Resilience:

- **Sector Renewal:** Organic can attract and create pathways for new entrants, and support diversified farm models.[11]
- **Food Security and Sovereignty:** Organic can support more localized and less import-reliant, resilient food systems, and enable greater control over food production, distribution, and access, including community-based and Indigenous-led food systems.

Despite these contributions, organic production has received limited policy recognition and investment in Canada. Meanwhile, **competitor jurisdictions, including the United States and the European Union, are investing strategically in organic production growth and market development**, with the US spending eight times more than Canada, including on a new US $300 million Organic Transition Initiative,[12] and the EU spending 200 times more on average.[13] Canada's relative lack of policy recognition and investment has created a competitiveness gap and increasing reliance on imports.

As a result of underinvestment, Canadian organic production has stalled, and is declining in some regions, even as demand continues to grow. **Canada's organic market now exceeds $11.88 billion (2025) and continues to grow 8% per year, yet nearly 80% of organic food consumed domestically is imported**, much of it from the US.[14]

Globally, the organic market exceeds $230 billion and is growing rapidly.[15] [16]

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[9] Organic Federation of Canada. Organic Science Cluster 4. https://www.organic-science-canada.ca/.
[10] A 2025 evidence synthesis report finds that organic farming systems maintain soil health on average, improve biodiversity through eliminating certain pesticides and supporting increased on-farm habitat retention, and reduce greenhouse gas emissions by 35% per acre and 15% per unit of production. Canadian Organic Growers. 2025. Cultivating the Organic Opportunity for Canadian Farmers and Consumers: Economic and Environmental Impacts of Organic Agriculture and Policy Recommendations for Canada. Canadian Organic Growers, Ottawa, ON. https://cog.ca/policy/organic-task-force/.
[11] Analysis of 2016 Census of Agriculture data indicates that younger farmers are disproportionately represented on organic farms. Library of Parliament. 2020. Organic Agriculture in Canada. Publication no. 2020-07-E. https://lop.parl.ca/sites/PublicWebsite/default/en_CA/ResearchPublications/202007E.
[12] U.S. Department of Agriculture. Organic Transition Initiative. https://www.farmers.gov/your-business/organic/organic-transition-initiative.
[13] Canadian Organic Growers. 2025. Cultivating the Organic Opportunity for Canadian Farmers and Consumers.
[14] Canadian Food Inspection Agency. "Celebrating 15 years of organic products Canadians can trust". https://inspection.canada.ca/en/inspect-and-protect/food-safety/celebrating-15-years-organic-products-canadians-can-trust.
[15] FiBL and IFOAM. The World of Organic Agriculture: Statistics and Emerging Trends 2026. https://www.fibl.org/en/shop-en/1861-organic-world-2026.
[16] The Indo-Pacific organic market is projected to double by 2029 - see: Bagnato, R. (2025). Organic food agreements open global markets to Canadian exporters. Export Development Canada. https://www.edc.ca/en/article/organic-food-agreements-open-globalmarkets-to-canadian-exporters.html.

This gap reflects persistent barriers to entry, transition risks, and structural constraints preventing sector growth; and represents a clear opportunity to strengthen competitiveness, expand domestic supply, reduce external dependence, and enhance resilience across Canada's agriculture and agri-food system. With targeted investments through the NPF, Canada can grow domestic production, capture a greater share of high-value market growth (both domestic and export), and advance broader resilience objectives.

Top Priorities to Enable Organic to Scale

Realizing the full potential of organic agriculture, aquaculture, and food will require targeted action to address persistent barriers, share risks with the sector, and build the conditions for participation across the value chain and at all scales of operation, including small and medium-sized enterprises. We have identified the following priority areas for the NPF:[17]

- **Transition support for farmers** to de-risk the multi-year conversion period to organic production and encourage new entrants
- **Extension and advisory services** to support farmers with organic agronomy, innovation, knowledge transfer, and technology adoption, including through peer networks and communities of practice
- **Increased investment in organic research** to support organic management, variety development, and beneficial management practices
- **Flexible incentive programming** to support adoption of practices and management systems that enhance productivity, profitability and environmental performance in organic systems and include early adopters
- **Adjusted Business Risk Management (BRM) programs** to reflect organic systems, risk profiles, crop values, yields, crop types, and management practices
- **Supply chain and infrastructure development**, including organic processing capacity, product development, and local and regional coordination to overcome structural gaps
- **Domestic market development and export support**, to strengthen awareness, public trust, and accessibility of Canadian organic products at home and abroad
- **Increased access to organic data** (production, price tracking, market intelligence and trade data) to enhance competitiveness and growth
- **Full and permanent funding** for the review of the Canadian Organic Standards
- **Sector development infrastructure** to increase capacity of industry to provide services
- **A stronger national coordination mechanism** for organic sector development to align investments, reduce duplication, share innovation, and support coherent long-term growth, consistent with recommendations from the OECD.[18]

The European market is projected to more than double in the coming years - see: Skål Europe. 2025. The Booming Economics of Organic Food in Europe. https://www.skaleurope.org/news/the-booming-economics-of-organic-food-in-europe/.

[17] The Canadian organic sector has undertaken significant planning through the development of an Organic Action Plan for Canada. Additional priorities identified through that process provide a strong foundation for the development of an organic food and farming strategy under the NPF. https://canada-organic.ca/en/what-we-do/advocacy/organic-action-plan-canada.

[18] "Some stronger form of national strategy or co-ordination mechanism could be a beneficial means of ensuring that efforts are not being duplicated in multiple areas, that all producers can benefit from useful innovations in tools or approaches, and that information or results generated through these initiatives is

Investing in organic agriculture and food through the NPF is an investment in a more resilient and competitive Canadian agriculture and agri-food sector.

Submitted by:

used to inform other advancements in policy where relevant." OECD (2020), Strengthening Agricultural Resilience in the Face of Multiple Risks, OECD Publishing, Paris, https://doi.org/10.1787/2250453e-en.

Atlantic Canadian Organic Regional Network

Canada Organic Trade Association

Canadian Organic Growers

Canadian Organic Seafood Association

Filière biologique du Québec

Growers of Organic Food Yukon

Manitoba Organics

Ontario Organic

Organic Agriculture Centre of Canada

Organic Alberta

Organic BC

Organic Federation of Canada

Organic Nova Scotia

PEI Certified Organic Producers Cooperative

Responsible Organic Customer Association

SaskOrganics Association Inc.

Union des producteurs agricoles

Appendix 1: Priority Areas and Actions

This section provides additional detail on the priority investment areas identified in this submission and how the NPF can help strengthen sector capacity, competitiveness, domestic supply capacity, sustainability, food security, and long-term resilience.

On-Farm Resilience and Risk Mitigation

Organic production can strengthen farm-level resilience by reducing input dependence, improving profitability, supporting soil health, creating the context for beneficial management practice adoption, and increasing adaptive capacity to climate and market shocks. However, current policy tools often do not reflect the realities of organic transition periods, diversified systems, and differentiated markets. Smaller-scale processing operations also face higher unit costs and limited access to capital. Targeted improvements could help reduce barriers to entry and support wider adoption.

Priority actions could include:

- Transition support to de-risk the multi-year conversion period, including temporary income stabilization measures, technical assistance, and planning support
- Modernization of agricultural risk management programs to better reflect organic production systems, crop values, yields, and management practices, while encouraging proactive risk management and systems-based resilience outcomes
- Incentive programming compatible with organic and low-input systems, including recognition of early adopters
- Improved access to insurance, financing, and other tools tailored to smaller-scale and diversified operations

Competitiveness, Markets, and Domestic Supply Capacity

Canada has strong and growing demand for organic products, yet domestic production and processing capacity have not kept pace. Strategic investment could strengthen competitiveness, reduce import dependence, increase domestic food supply capacity, improve food security, and create new opportunities for Canadian farmers and food businesses in domestic and export markets.

Priority actions could include:

- Identification and increased domestic production of priority organic crops, products, seed, feed, and ingredients
- Investments in organic processing, storage, aggregation, and distribution infrastructure at appropriate scales, including small and medium-sized farms, processors, and food businesses.
- Market development and export support to ensure fair market access and build consumer demand and trust in Canadian organic products domestically and internationally
- Improved organic market intelligence, price reporting, production data, and trade information
- Certification supports that reduce market access barriers for producers and processors
- Supply chain development and coordination that strengthens domestic food system capacity and strategic independence
- Alignment of trade policy and regulatory frameworks with organic standards and equivalency agreements
- Public procurement opportunities that support domestic, local, and organic food sourcing

Innovation, Research, and Knowledge Transfer

Long-term competitiveness and resilience depend on continuous innovation, integrated knowledge systems, and strong research-to-extension pipelines. Organic systems demonstrate a model of innovation based on system-level adaptation, with producers acting as early adopters of practices related to soil health, diversification, and biologically-based management. Expanding organic production will require increased availability of research, agronomic advisory services, and farmer-to-farmer learning networks.

Priority actions could include:

- Increasing public investment in organic and low-input research, including variety development, biological inputs, soil health, nutrient cycling, and applied agronomy
- Protection and expansion of long-term field research and on-farm trial capacity
- Expanding independent advisory services and extension with expertise in organic and low-input farming systems
- Support for farmer-led innovation, peer-to-peer learning, and communities of practice

- On-farm data collection, benchmarking, and performance measurement to support on-farm decision-making and improve resilience, productivity, profitability, environmental performance, market access, and reporting
- Better integration of organic research and priorities into policy and program design

Sector Renewal and Workforce Capacity

Long-term growth depends on human resource capacity, succession planning, labour availability, and institutional capacity. With 40% of farmers projected to retire by the end of the NPF, expanded strategies to support new entrants will be essential. Many prospective producers are interested in sustainable production, and organic presents a clear opportunity. Expanding organic production will require stronger pathways for new entrants, skilled labour, capital and land access solutions, and coordinated sector leadership.

Priority actions could include:

- Fund programs and organizations that support new entrants to organic agriculture (including aquaculture), including on-farm apprenticeships, land matching, and tailored new entrant support services, including for youth, Indigenous, and newcomer producers
- Targeted training and skills development in organic production, processing, and value-added sectors
- Labour attraction and retention strategies relevant to diversified and value-added operations
- Capacity support for sector organizations delivering producer services, market development, and training

Appendix 2: Canadian Organic Standards as Strategic Infrastructure

Canada's organic sector operates through the Canadian Organic Standards, a national regulatory framework that governs organic production, processing, and labelling.[19] The standards provide clear rules and market integrity across the value chain, and are based on four general principles: health, ecology, fairness, and care.[20]

Organic certification requires consistent documentation of management practices and inputs, and third-party audit processes. The framework sets defined production and processing standards intended to support soil health, biodiversity, nutrient cycling, responsible input use, animal welfare, traceability, and market expectations for organic integrity.[21]

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[19] Canadian Food Inspection Agency. 2026. Canadian Organic Standards. https://inspection.canada.ca/en/food-labels/organic-products/standards.

[20] See Introduction (pg. 1) of CAN/CGSB-32.310, "General principles of organic production". These international consensus-based principles are developed by the International Federation of Organic Agriculture Movements. https://publications.gc.ca/collections/collection_2026/ongc-cgsb/P29-32-310-2026-eng.pdf.

[21] Under the Canadian Organic Standards Standard CAN/CGSB 32.310, "Organic production systems : general principles and management standards," organic production is defined as "a holistic system designed to optimize the productivity and health of agro-ecosystems, including soil organisms, plants, livestock, and people. The principal goal of organic production is to develop enterprises that are

By operating through a defined and enforceable system, organic offers governments a credible platform for advancing resilience, competitiveness, sustainability, and public trust.

The standards also underpin Canada's international organic trade equivalency arrangements, supporting access to premium export markets and facilitating trade with major partners. Canada has nine organic equivalency arrangements with 35 countries, representing over 90% of the global organic market.[22]

As the NPF considers strategic growth opportunities, organic represents an opportunity to scale outcomes through an existing, trusted, and market-ready framework.

sustainable and harmonious with the environment."
https://www.publications.gc.ca/site/eng/9.960491/publication.html.

[22] Canadian Food Inspection Agency. 2026. Organic equivalency arrangements.
https://inspection.canada.ca/en/food-labels/organic-products/equivalence-arrangements.