



The British Columbia Cranberry Marketing Commission 2011 - 2016 Strategic Plan



Completed September 2011
Developed by Karen Fenske of StratPoint Solutions

Funding provided by:



Table of Contents

The Results

Abbreviations	3
Executive Summary	4
Who We Are	5
Emerging Trends	6
Strategic Overview.....	7

The 2011-2016 Strategic Plan 8

<i>Financial Plans</i>	12
------------------------------	----

The Research

The Process	13
How Far We Have Come	14
The Current BC Situation	18
The Current National Situation	19
The Current North American Situation.....	20
Strengths, Weaknesses, Opportunities, Threats.....	21

Appendix A: Statistics (BC and Canadian)	26
--	----

Appendix B: Growers, Producer-Vendors and Agencies	27
--	----

Appendix C: Research Summary.....	28
-----------------------------------	----

Appendix D: PR Activities Summary	29
---	----

Appendix E: Strategic Priority Budgets	31
--	----

References and Literature Review.....	32
---------------------------------------	----

Acknowledgements

We, the BC Cranberry Marketing Commission, wish to acknowledge the financial assistance of Agriculture and Agri-Food Canada, the B.C. Ministry of Agriculture, and the Investment Agriculture Foundation of B.C. for making this Strategic Plan project possible.

Agriculture and Agri-Food Canada, the B.C. Ministry of Agriculture and the Investment Agriculture Foundation of BC, are pleased to participate in the production of this project. We are committed to working with our industry partners to address issues of importance to the agriculture and agri-food industry in British Columbia. Opinions expressed in this publication are those of the BC Cranberry Marketing Commission and StratPoint Solutions and not necessarily those of the Investment Agriculture Foundation, the B.C. Ministry of Agriculture or Agriculture and Agri-Food Canada.

Abbreviations

The BC Cranberry Marketing Commission (BCCMC):

GM	General Manager (Jack Wessel)
Staff	Administrative Assistant (Diane Driessen)
DC	Director of Communications (Geraldine Auston)

Other organizations:

AAFC	Agriculture and Agri-Food Canada
BCAC	BC Agriculture Council
BCMA	BC Ministry of Agriculture
BCCGA	BC Cranberry Growers Association
CHC	Canadian Horticulture Council
CFIA	Canadian Food Inspection Agency
CI	Cranberry Institute (USA)
CMC USA	Cranberry Marketing Committee
COMB	Council of Marketing Boards
FIRB	Farm Industry Review Board
FSI	Food Safety Initiative
IAF	Investment Agriculture Fund
IPM	Integrated Pest Management Program
PARC	Pacific Agri-Food Research Centre
PMRA	Pest Management Regulatory Agency
W.E.D.	Western Economic Diversification Program

Executive Summary

The British Columbia Cranberry Marketing Commission (BCCMC) has become a thriving, leader in the cranberry industry. It has stayed on target with its legislated mandate to facilitate a fair market place. There are several achievements to be proud of such as the establishment of the Research Society and Research Farm, the exceptional level of education available to growers and consumers through events and information, a cohesive industry and most importantly the fact that Vancouver has the highest per capita intake of cranberries in BC. Commissioners said it best: “if we look at the big picture, we are miles ahead from where we were” and “our strengths outweigh our weaknesses by far.”

That being said, there are a few challenges that this strategic plan addresses. Currently this prosperous sector is experiencing decreasing yields. Although acreage is up yields have been declining i.e. 800,000 pounds to 600,000 pounds over four years with no obvious reason. The development of the research farm facility and continued research are expected to have positive impacts in this area.

Fortunately the grower group is experienced and keen to learn new methods which will benefit product quality and quantity. The BCCMC will continue to provide educational opportunities and explore new techniques to transfer knowledge to growers.

The BC cranberry industry is currently stable as it continues to produce a high-quality, safe cranberries. However, there is concern about dependence on Ocean Spray, a USA cooperative, as their fundamental marketing channel. The issue of maintaining market access will need to be addressed with continued industry relationship development as well as designing a crisis management strategy for potential border closures. Growers will also need to shift their methods to meet a variety of safety standards to ensure access to expanding global markets.

The Commission has done an extremely good job at promoting the benefits of cranberries. This will need to continue as competition is stiff between all fruits. However, as consumers look for “food with integrity” the messaging will need to shift to the positive environmental stewardship of the industry and what cranberry farms contribute to their communities.

The Commission is a healthy, well-run organization that will need to rise to the challenge of passing on the legacy in a seamless manner. In the near future a new Chair will be appointed, a new General Manager selected, and eventually new Commissioners will need to fill the shoes of current Commissioners who choose to retire. Implementing succession plans, providing orientation and adding structural tools that will inform and guide successors will assist in maintaining the momentum for the future.

This strategic plan project includes research into what has been achieved, the current situation, what the priorities will be for the future, and what actions will move the BCCMC forward. This plan is the result of a passionate, committed team of people who volunteered their time and energy to ensure that the BCCMC success is maintained and has the capacity to achieve its goals.

Who We Are

The BC Cranberry Marketing Commission (BCCMC) has maintained its original mandate to promote, regulate and control cranberries in the areas of transportation, processing, packing, storing and marketing as established in 1965. However, it to ensure a strong legacy clear statements defining direction are needed. Therefore a Vision Statement, a modified Mission Statement, and defined Purposes were created.

Vision Statement (2011):

BC cranberry growers will be leaders in the global cranberry market.

Mission Statement (2011):

The BC Cranberry Marketing Commission is committed to enhancing industry competitiveness through organized marketing, research, industry promotion and communications.

Recommended BCCMC Purposes (2011):

- Maintain a regulated marketing system.
- Support ongoing research and development within the industry.
- Advance grower production knowledge through appropriate training and education.
- Provide increased industry promotion and review diversification opportunities.
- Enhance communications and cooperation.
- Maintain industry initiatives and strategic focus by strengthening the Commission.

The BCCMC Structure

The BCCMC is comprised of a Chair appointed by the Lieutenant Governor in Council, three volunteer Commissioners who are producers, and one voting non-grower who is waiting official approval to join the Commission. The operation of the Commission is funded entirely through license fees and/or levies paid by producers, producers-vendors and agencies.

The BCCMC Authority

The Commission acts on the authority delegated by the:

1. **Natural Products Marketing (BC) Act, R.S.B.C. 1996, c.330.** The NPMA provides for the promotion, control and regulation of the production, transportation, packing, storage and marketing of agricultural products. Producers may join together and ask the government to delegate authority to regulate a specific agricultural product. If the request is granted, a marketing scheme is established as a regulation under the NPMA, and a marketing board or commission is formed to administer the regulation.
2. **British Columbia Cranberry Marketing Scheme, B.C. reg. 259/68.** The British Columbia Cranberry Marketing Scheme establishes the Commission and prescribes its rules and procedures.
3. **BC Cranberry Marketing Commission General Orders July 2010.** This document clarifies the Scheme.

See the References and Literature Review section for links to above documents.

Impacts of Emerging Trends

- **FOOD AND HEALTH CONVERGE** on commercial relevance. A wave of genetic science, changing consumer preferences and pressure to relieve higher health-care costs continues to redefine nutrition and pharmaceuticals. Cranberries will enjoy great consumer demand, due in part to their **HEALTH BENEFITS**. This is a key marketing advantage.¹
- Consumer demand is shifting towards products that are **LOW IN SUGAR AND LESS PROCESSED**. The issue with cranberries is that they generally require processing and sugar to be added. While Ocean Spray, the main marketing partner, develops low-sugar products the BCCMC can work to communicate that all fruit has significant amounts of sugar.
- **TRACEABILITY** requirements are increasing standardization, assessments and labeling practices on all levels. Although BC Cranberry growers are expected to follow standard food safety practices all stakeholders will need to also ensure detailed documentation exists for health emergencies to be managed efficiently, should they arise.
- Buyers want an efficient marketing system with an **AMPLE SUPPLY THAT MEETS STANDARDS**. BC growers will need to improve yields and ensure product meets a variety of global standards.
- A thriving industry needs easy **MARKET ACCESS**. For the BCCMC this involves a variety of tasks such as working at strong industry relations, attending meetings with global partners, remaining engaged in sector development, and being prepared for border closure emergencies.
- The move to increased **COMMUNICATION AND COOPERATION** throughout **VALUE-CHAINS** is a cultural shift that the BCCMC can maintain. It is strategically positioned within the industry to facilitate communication, industry relationship development and information sharing to educate growers.
- The **RETIRING POPULATION AND REDUCED VOLUNTEERISM** is being felt across the nation. There are fewer people willing to replace Commissioners. The BCCMC will need to implement tools and structure to ensure seamless succession. At the same time, they may benefit from professionals, such as researchers who want to retire to part-time work.
- There is the growing reality that sectors need to be proactive and **SELF-SUFFICIENT**. Although the BCCMC has enjoyed solid funding partnerships with government bodies additional funding options may need to be explored in the future.

¹ Food Foresight (2011). Food Foresight 2011 Trends Intelligence Report. See http://www.foodforesight.com/priority_trends.html

Strategic Priorities, Goals & Objectives Summary for 2011 – 2016

STRATEGIC PRIORITY #1 SUPPORT COMPETITIVE PRODUCT DEVELOPMENT

Yields benefit from research and development.

- The Cranberry Research Farm will be operational.
- New crop management practices and varieties will be available.

Crop management is consistent.

- Grower production knowledge will increase.
- Funds will be available for grower education programs.

STRATEGIC PRIORITY #2 FACILITATE A THRIVING INDUSTRY

Industry relations continue to be strong.

- Industry stakeholders will be clear about what the Commission does.
- The trusting, supportive BC environment will remain.
- A strong relationship will exist with Canadian stakeholders.
- Transparent and mutually beneficial relationships will exist with American entities.

Market options continue to increase.

- New markets will be accessed for existing and new products.
- Product will meet expanding market food safety standards.

Consumers choose cranberries.

- The main PR message will shift to promote the farmers and the positive environmental stewardship of the industry.
- Consumer interest in cranberries will be maintained.

Food safety issues are handled quickly.

- A media response plan will be in place.

Market access emergencies are managed efficiently.

- A crisis management strategy will be available.

STRATEGIC PRIORITY #3 MAINTAIN A LEADING ROLE IN THE INDUSTRY

The Commission has the human resources to fulfill its role.

- Staff succession tools will be in place.
- Staff will be prepared.
- A new Chair will be prepared for the role.
- Commissioners will exist and be prepared for their role.

The BCCMC operates with efficient, sustainable practices.

- Planning will facilitate goal achievement and successive Commissioners will know what to do and when.
- Sufficient funds will be available.

Regulations support BCCMC functions.

- The BC Regulation amendments will be approved.

Strategic Plan for the BC Cranberry Marketing Commission 2011 -2016

STRATEGIC PRIORITY #1: SUPPORT COMPETITIVE PRODUCT DEVELOPMENT

(COMM = Commissioners, GM= General Manager, DC= Director of Communications)

GOALS 2011-2016	OBJECTIVE	ACTION	WHEN & WHO	MEASURABLE OUTCOME	
Yields benefit from research and development.	The Cranberry Research Farm will be operational.	Define the facility purposes, identify the research to be performed, and clarify the organizational structure and relationship with BCCMC.	2011 GM & COMM	Declaration exists.	
		Design the facility; solicit technical site-development knowledge from other facilities.	2011/2012 GM & COMM	Plans are ready for construction.	
		Hire a general contractor.	2011 GM & WED	Contractor is engaged.	
		Construct the facility.	2012 GM & WED	Facility exists.	
		Recruit human resources i.e. manager (explore retiring government employees).	2013/2014 GM	Research farm has staff.	
		Promote Research Farm. (Explore Promotions Assistant to work with Dir. Communications)	2014/2015 GM & COMM	PR strategy is implemented.	
		Develop a sustainability strategy i.e. self-supporting activities, funding partnerships, etc.	2015 GM & IAF	Strategy exists and options are being engaged.	
		New crop management practices, and varieties will be available.	Continue to support research performed at: Pacific Agassiz Research Center, Washington State Univ. and other facilities.	Ongoing GM & IAF	Funding is provided and results are available.
			Continue BCCMC Research Committee process.	Ongoing	Projects exist and continue.
			Transition research projects to the Farm.	2014/ 2015	Research is underway.
Crop management is consistent.	Grower production knowledge will increase.	Continue to distribute information to licensees via the website and newsletters.	Ongoing GM	Relevant information is available.	
		Implement an email/on-line newsletter.	2012/ GM	Email newsletter is sent out.	
		Continue to host the Cranberry Congress.	Annually GM & DC	Cranberry Congress occurs annually.	
		Continue to host the Field Days. Use the Research Farm for Field Days in 2016.	2012/ 2014 GM & DC	Field Days occur.	
		Hold workshops on farm succession planning.	2012 GM, DC & IAF	Workshops have been provided.	
		Evaluate grower knowledge to determine gaps and explore enhanced delivery methods.	2013 GM, DC & IAF	Awareness study exists. New methods are known.	
		Funds will be available for grower education programs.	Explore co-op advertising, local sponsors, event ticket sales, etc.	2012 GM & DC	Options are available and being engaged.

STRATEGIC PRIORITY #2: FACILITATE A THRIVING INDUSTRY

GOALS 2011-2016	OBJECTIVE	ACTION	WHEN & WHO	MEASURABLE OUTCOME
Industry relations continue to be strong.	Industry stakeholders will be clear about what the Commission does.	Develop a profile which identifies BCCMC activities, roles and responsibilities versus those of the BCCGA.	2011 GM & BCCGA	A BCCMC/ BCCGA program/service profile exists.
		Distribute a report about the BCCMC strengths and achievements i.e. an annual report.	Annually GM & DC	Report is distributed.
		Inform new entrants that they must be licensed with the BCCMC before Ocean Spray.	As required. GM	All new entrants are licensed with the BCCMC.
	The trusting, supportive BC environment will remain.	Continue to inform, discuss development, and manage conflicts with licensees.	Ongoing GM & DC	Licensees are amenable and supportive; conflicts are few.
		Uphold the affiliation with the BCCGA and connect with Kwantlen College.	Ongoing GM & COMM	Regular communication exists and programs are funded.
		Assess new applicants.	As required. GM & COMM	Applicants are reviewed.
	A strong relationship will exist with Canadian stakeholders.	Develop consistent communications with eastern growers, invite to events.	Ongoing GM	Regular communication exists and programs are funded.
		Continue to support PRMA applications and the Canadian Cranberry Growers Coalition via BCCGA.	Ongoing COMM	BCCGA work is funded.
		Continue to work with AAFC, the BC Ministry of Agriculture and BCFIRB.	Ongoing GM & COMM	Regular communication exists.
		Maintain membership with and attend the Canadian Horticulture Council meetings.	Ongoing GM & COMM	Membership is paid and reps are present.
	Transparent and mutually beneficial relationships will exist with American entities.	Attend USA CMC, CI and the Pacific Coast Cranberry Research Association at Washington State University meetings and fund projects.	Ongoing GM & COMM	Regular communication exists and programs are funded.
Market options continue to increase.	New markets will be accessed for existing and new products.	Contribute to USA CMC marketing projects including foreign development into Asia, Australia, Britain, France, and Europe.	Ongoing GM & COMM	Projects are funded.
		Promote value-added product development by using samples at events and developing recipes.	Ongoing DC	Samples are used and new recipes exist.
	Product will meet expanding market food safety standards.	Growers will produce cranberries to meet European Union standards.	2011/2012 Agencies & Prod. Vendors	The BC crop meets EU standards.
		Explore and communicate traceability process upgrades.	2012/ 2013 BCCMC Research Com'te	Improved traceability practices are in place.

Consumers choose cranberries.	The main PR message will shift to promote the farmers and the positive environmental stewardship of the industry.	Create more messaging to include the multi-generational industry and the positive environmental stewardship of the industry i.e. how it deals with integrated pest management, efficient irrigation systems, etc., and what cranberry farms contribute financially to their communities in the way of employment. (Economic Impact Study ²)	2012 DC, GM & IAF	Economic Impact Study is complete. Message is distributed.
		New PR options include: <ul style="list-style-type: none"> • circulate an industry report re: research projects, what growers are actually doing, etc., • hold a harvest media day at a field, • perform Research Farm tours, • develop an “Education Corner” for schools and tourists to view. (Field tours are very difficult to arrange due to liability issues.) Hire PR assistant or increase DC hours. 	2011 & as resources become available DC & GM	Industry report is circulated. A harvest media day is held. Research Farm tours occur. The “Education Corner” is operational.
	Maintain consumer interest in cranberries.	Continue current PR activities.	Ongoing DC & GM	Cranberry sales are constant or increase.
		Support health-related research through the CCGC and the CI.	Ongoing GM & COMM	Projects are funded and results are acquired.
		Update the “Cranberry Dinner” set and create new recipes.	Ongoing DC	New recipes are available.
Food safety issues are handled quickly.	A media response plan will be in place.	In consultation with the BCCGA identify a spokesperson.	2011 GM & COMM	Media spokesperson is declared and prepared.
		Develop a message and communication strategy for media, etc.	2012 GM & DC	Message and connections exist.
Market access emergencies are managed efficiently.	A crisis management strategy will be available.	In consultation with the BCCGA, identify the industry leader and a spokesperson.	2012 GM & COMM	Crisis Manager is declared and prepared.
		Develop a short term strategy and protocol. Consult with Ocean Spray regarding options.	2012 GM & COMM	Protocol is approved.
		Communicate the Crisis Management Plan to licensees.	As required. GM & DC	Stakeholders are aware of the plan.

² Example of Economic study: British Columbia Association of Farmers' Markets and School of Environmental Planning, University of Northern British Columbia (November 2, 2006). *Economic and Community Impacts of Farmers Markets in British Columbia*. See Link: www.unbc.ca/planning/localfood/

STRATEGIC PRIORITY #3: MAINTAIN A LEADING ROLE IN THE INDUSTRY

The Commission has the human resources to fulfill its role.	Staff succession tools will be in place.	Create: <ul style="list-style-type: none"> job descriptions for all staff, develop an HR profile to clarify responsibilities, develop an Annual Workplan, create an Operations Manual. 	2011/2012	Job descriptions, an HR profile, an Annual Workplan, and an Operations Manual exist.
	Staff will be prepared.	Recruit staff replacement, train and orientate.	2012	Required staff is in place.
	A new Chair will be prepared for the role.	Prepare a Chair transition plan i.e. current Chair and GM will orientate new Chair.	2011/2012 Chair & GM	Transition plan exists and orientation occurs.
	Commissioners will exist and be prepared for their role.	Declare Commissioner needs on an annual basis. "Keep a look out for trainees".	Annually	Post-AGM Meeting Minutes state commitments and needs.
		Add two new Commissioners to the group to allow for training and orientation.	As required.	New Commissioners are trained.
		Attend COGA governance seminars.	Ongoing/ All	Commissioners attend.
The BCCMC operates with efficient, sustainable practices.	Planning will facilitate goal achievement and successive Commissioners will know what to do and when.	Implement an annual planning meeting/process to align all tasks including PR actions with BCCMC goals (include Director of Communications in relevant discussions).	2011/2012 COMM,GM & DC	An Annual Workplan/ Calendar exists.
		Prioritize programs and activities to prepare for financial reallocations due to reduced income.*	2011/2012 GM & DC	Strategy exists to shift human and financial resources.
		Monitor Strategic Plan progress.	Ongoing/ GM	Regular reports will occur.
		Submit to COMB organizational review.	2016	COMB review is complete.
	Sufficient funds will be available.	Develop a funding strategy for promotional and grower educational activities i.e. sponsorships, co-op advertising, etc.*	2012 GM & DC	Options are available.
		Continue to explore funding partnerships i.e. Growing Forward, IAF, Organic Sector Development Program (IAF), etc.	2013 GM	Options are available.
		Financial management will maintain transparency.	Ongoing/ GM	Financial reporting continues.
Regulations support BCCMC functions.	The BC Regulation amendments will be approved.	Work with BCFIRB to clarify the BC regulation and include the Special Advisor appointment.	Ongoing GM	BC Regulation is approved. The Special Advisor is officially appointed.
		Explore policies to integrate specialty products such as organic produce.	2014 GM & COMM	Policies exist.

* Poor crops will reduce Commission revenue, IAF's contract will conclude in 2012 and there are no guarantees, and the value of the U.S. dollar could have a negative impact on sales.

Financial Plans

The BCCMC Strategic Plan outlines strategic initiatives that are considered essential to achieving the goals and objectives included in the plan. Below you will find general budgets for the next 5 years. Strategic Priorities estimated budgets including potential funding partner contributions can be found in Appendix E.

Projected Financial Plan for 2012 – 2016

Revenue	Year 1 / 2012		Year 2 / 2013		Year 3 / 2014		Year 4 / 2015		Year 5 / 2016	
BCCMC Levy	450,000	81%	450,000	81%	450,000	82%	450,000	95%	450,000	94%
Funding Partners	108,500	19%	102,500	19%	101,500	18%	25,000	5%	28,000	6%
Total Revenue	558,500	100%	552,500	100%	551,500	100%	475,000	100%	478,000	100%
Expenses										
BCCMC Operations	120,000	27%	120,000	27%	120,000	28%	120,000	31%	120,000	31%
Strategic Priorities *	320,000	73%	327,000	73%	313,000	72%	272,000	69%	266,000	69%
Total Expenses	440,000	100%	447,000	100%	433,000	100%	392,000	100%	386,000	100%
Surplus/ Deficit	118,500		105,500		118,500		83,000		92,000	

**Percentage of Strategic Priorities Budget for Initiatives*

	Year 1 2012	Year 2 2013	Year 3 2014	Year 4 2015	Year 5 2016
Production and Grower Education	75%	74%	73%	71%	68%
Marketing, PR and Industry Relations	25%	26%	26%	29%	30%
BCCMC Capacity Development	0%	0%	1%	0%	2%

The Process

Background

The BCCMC required a new strategic plan to provide direction and maintain growth. In June 2011, the BCCMC hired contractor, Karen Fenske of StratPoint Solutions, Vernon, BC to develop and facilitate the process which was completed by September 2011. The project was completed with the funding support from the Investment Agriculture Foundation of BC. Prior to this the BCCMC developed a strategic plan in 2006.

Methodology

The participants as listed below gave of their time, expertise and experience:

Chair	John Savage	General Manager	Jack Wessel
Vice Chair/Commissioner	Jeff Hamilton	Administrative Assistant	Diane Driessen
Commissioner	Allen May	Director of Communications	Geraldine Auston
Commissioner	Todd May	President of BCCGA	Grant Keefer
Special Advisor	Jack Brown		

This project included an analysis of the previous strategic plan goals (2006) which resulted in the list of achievements in the next section (outstanding work has been incorporated into the new plan), information from a variety of resources (see References), and interviews with the BCCMC Commissioners and staff. A one-day planning meeting was held in Surrey, BC on August 9th, 2011 to review BCCMC strengths, weaknesses, threats and opportunities, to evaluate the vision and mission statements, and to set strategic priorities. A strategic plan was created and a report completed; both were approved by the BCCMC.

Scope of the Work

This project will impact the remainder of 2011, and all of 2012, 2013, 2014, 2015, and 2016. In 2016 planning for the next strategic plan should take place so the plan will be ready for 2017.

Process Management and Evaluation

Strategic plans are living documents that need evaluation and adjustment to make them useful. Although the 2006 plan was revised in 2008 evaluation has not been a regular task. Henceforth, it is the expectation that the General Manager will review and report on progress of the strategic activities. The Plan is a user-friendly tool to facilitate efficient business planning and evaluation.

Outcomes of this Plan

The main purpose of this strategic plan is to provide clear direction for the Commission for the future. The information contained in this project will allow the BCCMC to make decisions which will also impact the growth of the industry as a whole. Another end-use will be to approach the Investment Agriculture Fund (IAF) for significant 5 year funding to help reach the objectives identified in the Plan. This plan is aligned with Agriculture and Agri-Food Canada "Growing Forward" goals for the development and sustainability of the agri-food industry in Canada.

Communications Plan

The final project will be posted on the BCCMC website, distributed to growers, agencies and producer-vendors via the newsletter, and sent to IAF.

ACHIEVEMENTS: How Far We Have Come

One of the benefits of a strategic planning process is discovering the achievements and growth that has occurred. The following paragraphs highlight achievements since the 2006 Strategic Plan up until September 2011 (outstanding work has been incorporated into the new plan).

Marketing

Over 90% percent of B.C. cranberry growers continue to be members of the Ocean Spray cooperative which is the main marketing channel for cranberries in North America. Lucerne Canada purchases local cranberries, some cranberries are sold at farmers' markets during Thanksgiving and Christmas, and there are several specialty stores and cranberry wineries. Ocean Spray is building a new receiving station in Richmond to be ready for 2012 crop.

Promotion

Since 2006 the BCCMC promotion efforts have been strategic and consistent (see Appendix D). A contractor was hired in 2006 to fill the role of Director of Communications to promote the BCCMC, and build awareness and loyalty between the farmer, cranberries and the consumer.

Materials such as the BCCMC logo, website and display booth, health information sheets, recipe brochures, bookmarks, value-added gift baskets, and industry information sheets have been developed to communicate the health benefit message and to explain the link between the farmer, the product, and the consumer. The health benefit research completed by the Cranberry Institute is utilized. Another example of success was the "Cranberry Whole Meal" brochure which was well received by farmers, farmers' market attendees, and consumers. As well the 2010 video clip³ which was distributed to 50 local media avenues received 1500 hits and a major Chinese channel ran it (delegates from this channel visited a BC farm). Materials are provided to the BC Ag in the Classroom program and the BC Home Economic Teachers Association. Information is streamed to growers via the BCCMC newsletter and website. Farm tours have taken place for promotion and consumer education. Media interest is strong, especially at harvest time; stations attend farms to do news spots and newspapers run articles. Overall knowledge about cranberries appears to have increased in the last five years.

The BCCMC has had a presence at many events (see Appendix D) using their display booth and/or material distribution. Connecting with dietitians, food technicians and chefs, at their national and regional conferences has had the greatest impact on increasing awareness as dietitians and chefs interact daily with all categories of consumers. These relationships have grown each year and acceptance exists. There has also been a booth at the annual fall 'Eat, Fraser Valley Food and Cooking Festival', which is a public food event with 10,000 attendees. For a variety of reasons, BC consumers once believed it was "wrong" to purchase Ocean Spray cranberry products. Messaging that explained Ocean Spray is run by farmers and uses Canadian farmers' produce appears to have had a positive affect on changing the consumer opinion; Vancouver has the highest per capita cranberry consumption rate in Canada.

Efforts to establish the BCCMC as the leader in the BC cranberry industry appear successful in that people know about the Commission, use their services, follow the Order, submit their fees and levies, and attend their educational and social events .

³ Cranberry Harvest Video clip: <http://photoshare.shaw.ca/view/3902142089-1193514064-22310/>

Research

Efforts to accomplish the research related tasks outlined in the 2006 plan have been very successful (see Appendix C). A Research Committee was established that includes representatives from the BCCMC, Pacific Agri-Food Research Centre (PARC), BC Cranberry Growers Association (BCCGA), Canadian Cranberry Growers Coalition (CCGA) and Washington State University. The Research Committee identifies priorities then selects proposals and contractors to pursue the objectives at the BCMA and PARC labs, and at other research facilities. Over 60 scientists are contacted annually throughout North America to provide input into the priorities list. This structure was chosen over the BCCMC hiring an in-house cranberry specialist.

The highlight of the period is the establishment of the BC Cranberry Research Society, incorporated the end of 2010, and the Research Farm facility. The BCCMC supported the Society's purchase of twenty acres in Delta which is being prepared for construction. Funding from the Western Economic Diversification program has been acquired to support development.

The task to encourage food functionality and new product development was completed in 2007 when the BCCMC conducted a market study of BC users of cranberries to determine what value-added products existed. The results were distributed to cranberry agencies and producer vendors for development. After receiving information from a carbon credit trading company the Commissioners chose not to pursue carbon credits as the credits did not present a viable benefit to the sector. In 2006 the BCCMC saw the need to spend resources on chemical registration which resulted in the BCCMC funding annual efficacy trails; the results were used by the BCCGA to apply for Pest Management Regulatory Agency (PMRA) registrations.

Even though most of the research has been production focused the BCCMC has streamed funding through the BCCGA to support health research at the CCGA. Organic research and product development has been a joint venture with Kwantlen College and other organic sector stakeholders.

Grower Education

Subsequent to the 2006 strategic plan a website and newsletter were instituted to communicate regularly with growers and to provide easy access to information. Forms such as the Producer Vendor - License Application and the Agency Application for License Renewal can be downloaded from the website. A contractor was hired to work with growers to meet food safety standards and as of 2011 all licensees follow the program; the contractor has been discontinued.

Semi-annual Field Days, which are opportunities for education, sharing ideas and connecting with sector stakeholders, were also established. Attendance started at 135 attendees in 2007 and increased to 210 in 2011. Another successful educational opportunity has been the Annual BC Cranberry Congress Day (grower workshops) in the Delta/Richmond area. Attendance of 90 growers exceeded expectations in 2007 and has continued to increase each year.

Although the Commission had some discussions regarding the development of an Interpretation Centre at the Richmond Nature Park this project was put on hold to give priority to the Research Farm. An Environmental Action Plan for the industry has been delayed until further notice.

Industry Relations

The BCCMC has maintained healthy, cooperative relationships with their licensees, the BCCGA, AAFC, and the BC Ministry of Agriculture (BCMA). The BC Farm Industry Review Board's (BCFIRB) annual Commission review has had very few recommendations. The few neighbor and land use complaints have been managed quickly.

The BCCMC has developed strong relationships with the USA Cranberry Marketing Committee (CMC) and the USA Cranberry Institute (CI), by attending their meetings and contributing to their projects. The BCCMC upholds a solid relationship with Ocean Spray by attending their meetings.

Organizational Capacity (HR, Financial, Governance and Regulations)

The General Manager during this period filled a half-time position along with a half-time Administrator and a Director of Communications who provided approximately 385 hours per year. These contracted employees (all working from home offices), and other operational costs are contained within a \$120,000 budget.

The Commission has been successfully funded through annual license fees from approximately 85 growers, 4 Agencies, and 7 Producer-Vendors (see Appendix B), and levy revenues from all growers. The levy rate was increased from \$0.38 per pound to \$0.48 in August 2011. Inquiries into other funding sources lead to a five year funding agreement with IAF which received a one year extension to conclude in the spring of 2012. The Federal government via the W.E.D. program has agreed to aid the Research Farm development.

Efforts to be inclusive, responsive and transparent resulted in the creation of the Cranberry Industry Advisory Committee in 2010. Although this group has been active in gathering and reporting grower input, reviewing Commission efforts to meet growers' needs, and sending a Special Advisor to the Commission it is waiting for the legal authority to appoint the member.

In 2009, as an organization dedicated to community sustainability, the Commission established the BCCMC Scholarship Grant to provide a \$2,000 grant for a licensee family member to acquire post-secondary education. Attempts to engage the next generation to attend seminars have had a weak response. Other organizations took the lead with immigrant worker programs.

Some of the BCCMC's stability has been due to long-time involvement of the current Commissioners. All Commissioners are involved, the responsibilities and workload are balanced and the number and structure of committees has worked well. The BCCMC completed an official review of the strategic plan in 2008. The Council of Marketing Boards (COMB) has recently completed a Commission organizational review with outstanding feedback.

Several BC Cranberry Marketing Commission General Order amendments were approved in the July 2010 issue. The two Scheme amendments: establishment of the Industry Advisory Committee giving it the power to appoint a Commissioner, and the clarification of the Commission's levy authority, are pending Provincial Government approval. In 2011 the Federal government passed the Agriculture Products Marketing Act amendments which included interprovincial and intraprovincial trade allowing levy collection on all cranberry products within, leaving and entering BC.

Since 2006 licensees have been required to meet Farm Safety Initiative (FSI) requirements and new Agencies have also agreed to financial audits as part of their application process. The BCCMC hasn't said "no" to applicants if they have filled out the application and complied with the criteria, however, it has been explained that there is no need for new production. It has been decided that the Ocean Spray standards are sufficient for the BC industry and development of Canadian standards would not be a valuable use of resources.

The Current Situation

In order to move forward organizations need to be aware of the current situation; in our modern world that includes being cognizant of what is happening in the “bigger picture”. This section briefly describes the current situation at three different levels.

THE BC SITUATION

The thriving British Columbia cranberry industry includes approximately eighty-five cranberry farmers (some 4th generation), seven producer-vendors, and four agencies all of which are licensed with the BCCMC. BC growers used 6508⁴ acres to produce 80 million pounds of fruit for a farm-gate value of \$49 million⁵. Most of the BC cranberry crop is found in the lower Fraser Valley and on Vancouver Island. Although the industry is successful planted acreage has increased while yields have decreased (see Appendix A).

The BC industry is known to provide safe, high quality cranberries which are processed into juice, wine, sauce, dried sweetened fruit, and are also sold fresh or frozen. Almost 95% of the BC cranberry production is marketed through the Ocean Spray cooperative located in Massachusetts, USA with offices in Richmond, BC. Ocean Spray processes, distributes, innovates and pursues domestic and foreign market development. Ocean Spray maximizes returns, which in turn adds stability to the industry. Of the approximately 6500 acres of cranberries in B.C. 60 acres of berries are sold fresh, and some product is marketed independently.

Other BC Cranberry Sector Participants

The **British Columbia Farm Industry Review Board** (BCFIRB) is a statutory appeal body with additional responsibilities for the general supervision of marketing boards and commissions in the agriculture and aquaculture sectors including the BCCMC. BCFIRB is accountable to government for its administrative operations, but is independent of government in its decision-making. As an independent tribunal, BCFIRB ensures that the public interest is served and protected.

The **BC Cranberry Growers Association** assists cranberry growers in resolving issues related to growers and to growing cranberries. As well, this group can lobby the government. There is a close relationship with the BCCMC particularly in the areas of research and industry promotion. BCCMC licensed producers may or may not be a member of the Association.

The AAFC **Pacific Agri-Food Research Centre** in Agassiz and Summerland provides research facilities to complete production research that benefits local cranberry growers.

The **Investment Agriculture Foundation** has provided substantial provincial funding for the cranberry sector in BC.

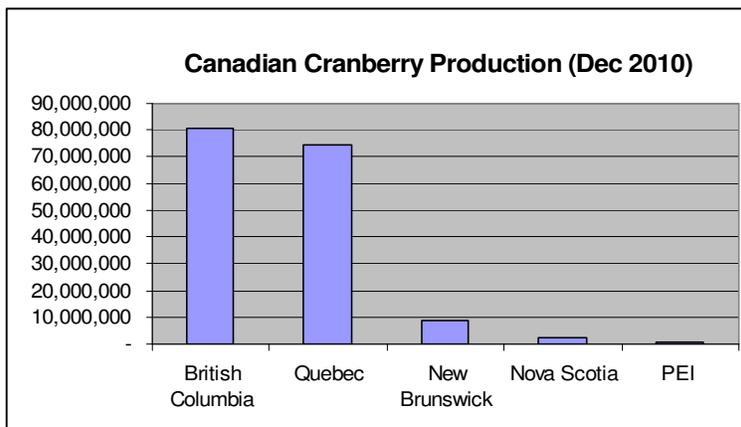
The Commission is a member of the **Canadian Horticulture Council**, and connects with the **BC Kwantlen College** research programs.

4 BCCMC (2011). Statistical Report to the 2011 Cranberry Commission AGM

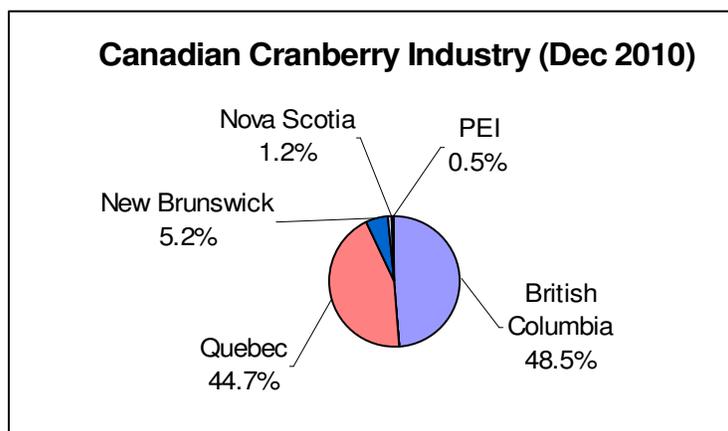
5 Statistics Canada (February 2011). "Fruit and Vegetable Production". Retrieved May 2011. Online at: <http://www.statcan.gc.ca/pub/22-003-x/22-003-x2010002-eng.pdf>

THE NATIONAL SITUATION

BC is currently the largest producer of cranberries in Canada providing 48.5 % of the total production⁶. Ontario, Newfoundland and Saskatchewan cranberry production is marginal, while Manitoba and Alberta do not produce (see Appendix A). In 2010, \$48 million dollars worth of fresh cranberries (HS Code 08104090) were exported to the United States, Germany, France, Russia, Taiwan, Dominican Republic, Netherlands, United Kingdom, Vietnam and Japan⁷. Canada imported \$21 million dollars of fresh and frozen cranberries from all countries in 2010⁸.



Statistics Canada (February 2011). "Fruit and Vegetable Production"



Statistics Canada (February 2011). "Fruit and Vegetable Production"

Canadian Cranberry Sector Participants

The **Canadian Cranberry Growers Coalition** is a federal not-for-profit society which was established in 2002 to represent all cranberry producing provinces. Its mandate includes funding cranberry research and promotion, initiating and monitoring pesticide registration, and connecting with federal, provincial and U.S.A. government agencies.

The **Canadian Food Inspection Agency** monitors Canadian cranberries to ensure that they comply with grading, packaging and labeling regulations.

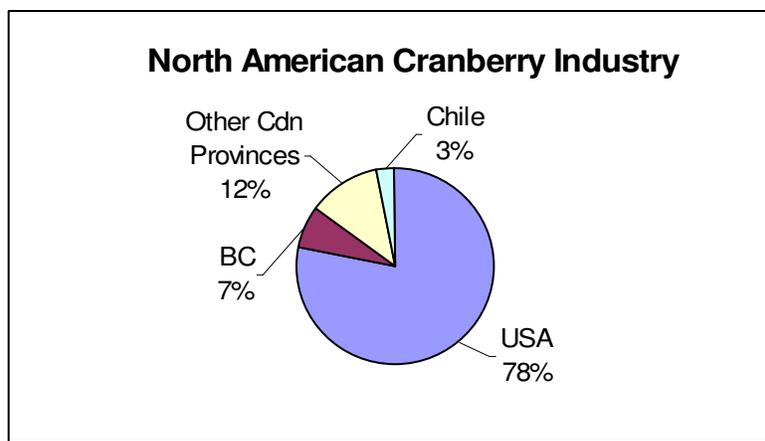
⁶ Statistics Canada (February 2011). "Fruit and Vegetable Production". Retrieved May 2011. Online at: <http://www.statcan.gc.ca/pub/22-003-x/22-003-x2010002-eng.pdf>

⁷ Agriculture and Agri-food Canada (2011-08-05) <http://www.ats.agr.gc.ca/pro/5321-eng.htm>

⁸ Statistics Canada, CATSNET Analytics (2011). Canadian Imports of Cranberries from all Countries.

NORTH AMERICAN SITUATION

According to Ocean Spray data BC cranberry production contributes approximately 7% of North American cranberry industry⁹ while the USA, Eastern Canada and Chile contribute the rest.



Ocean Spray Cranberries, Inc. 2011

North American Cranberry Sector Participants

Ocean Spray is an American agricultural cooperative owned by more than 750 cranberry growers in the United States and Canada and grapefruit growers in Florida. Ocean Spray was founded 80 years ago and is now North America's leading producer of canned and bottled juices and juice drinks, and is the best-selling brand name in the canned and bottled juice category. In 2010 Ocean Spray posted fiscal sales of \$2.05 billion and net proceeds of \$340 million.¹⁰ Their products include cranberry sauce, fruit juices, and dried cranberries (Craisins). Ocean Spray is the main marketing channel for BC product.

The **Cranberry Marketing Committee (CMC)** is a large American organization providing North American cranberry producers with substantial industry promotion, particularly in global markets such as Asia, Australia, Britain, France, and Europe. As an aside, the CMC 2010 vote resulted in over 80% of their members supporting its continuation, this speaks to the industry health of our main trade partner. The BCCMC contributes financially to CMC marketing projects.

The **Cranberry Institute (CI)** is an American not-for-profit organization established to advance cranberry research in health and agricultural and environmental stewardship, to promote the industry, and educate consumers about the benefits of cranberries. The CI provides reliable, relevant information in a timely manner. The CI projects are funded by several members including the BCCMC.

The **Pacific Coast Cranberry Research Association** at Washington State University is a research facility that completes projects supported by the BCCMC for cranberry growers.

⁹ Ocean Spray Cranberries, Inc. (2011). Crop Forecast Summer 2011.

¹⁰ Ocean Spray website http://pims.multimedia.com/Ocean_Spray_Spring_2011/press_releases.php

BCCMC Strengths, Weaknesses, Threats and Opportunities

The following section presents details of BCCMC as perceived by the Commissioners and staff.

MARKETING

Strengths

Most of BC Cranberry growers (95%) are members of the Ocean Spray co-operative which processes, distributes, innovates and pursues market development. Ocean Spray is currently experiencing a very successful branded product period that benefits most growers in BC, which in turn benefits the Commission by providing a stable industry (Ocean Spray pays approximately \$0.60/lb). Ten years ago Ocean Spray restructured, and hired new management who are future-focused, strategic, innovative leaders with transparent practices. Foreign market development is being accomplished by Ocean Spray's gradual growth strategy in Asia, Australia, Britain, France, and other European countries. The BCCMC tried to retain marketing funds in the past and learned that Ocean Spray accomplishes more with their leveraged funds. The new Ocean Spray receiving station in Richmond will be an asset.

Although demand for cranberries is growing outside of North America there is an oversupply of cranberries and Ocean Spray is not offering any further planting contracts. Future supply is somewhat controlled in that Ocean Spray asks their current producers for more production before they seek new members so a "surprise market share take over" by a producer or country is remote. (The main operation in Chile is owned by an American). Product innovation is performed continuously by Ocean Spray and local producers, and significant growth has occurred with Craisins. Lucerne Canada buys local cranberries for cranberry sauce and to sell whole frozen.

Weaknesses

One acre should produce 15,000 – 20,000 pounds of cranberries but the 6500 acres in BC only produce 80,000,000 pounds, 50% of the USA yield. Independent producers receive \$0.15-\$0.20 per pound for their product so some would like to return to Ocean Spray. New entrants have a steep learning curve and a five year wait for their first harvest.

Threats

BC relies heavily on Ocean Spray who could change their practices i.e. should the price drop or the dollar stay low the industry would destabilize if Ocean Spray chose to buy only USA product. The USA could close the border due to a health-related crop issue (contamination from water pollutants, chemical residues, wrong pesticide use, and infestations), a special interest group advocating against a chemical, etc. BC wouldn't have storage facilities (local commercial freezers are full when cranberries are harvested), processing plants, or a distribution channel. There is a remote chance the USA could pass a national Levy Order placing a levy on imported product similar to highbush blueberries. As well, consumers are seeking low sugar products so the cranberry juice market has been impacted by plain water sales.

Opportunities

The BCCMC can facilitate marketing channels by continuing strong relationships with the USA CMC and Ocean Spray, developing an emergency plan for potential border closure and maintaining consistent traceability processes to meet compliance with EU standards, etc. The BCCMC can explore new applicants. Product innovation and value-added product development with Ocean Spray and local producers can be supported.

RESEARCH

Strengths

The Commission recognizes the critical need to support research therefore expends significant resources in this area. The Research Committee, with its broad representation, “does an excellent job” of proposal selection and project management, and has kept pace with their ambitious plan. Project results are discussed with stakeholders at the annual Cranberry Congress and via the BCCMC newsletter and website. IAF has financially supported research over the past 5 years, a testimony to the strong relationship with BCCMC. The Commissions’ patience has been rewarded with the new Research Farm facility. The Western Economic Diversification program will be supporting the Research Farm development. The BCCMC supports and accesses health-based research completed by the CCGC and the CI.

Threats

The BC cranberry acreage is up but yields have declined from 80,000,000 pounds (800,000 barrels) to 60,000,000 pounds (600,000 barrels) with no obvious reason. As well, Government contributions to support BCCMC research may decline.

Opportunities

The Research Farm will be the key to the future of the cranberry industry in BC. The Commission can expect to funnel resources into its development over the next five years. The increase in production research to improve yields will be critical.

GROWER EDUCATION

Strengths

The Commission has sufficient tools to educate growers such as an informative website, a newsletter that is distributed semi-annually, knowledgeable staff and Commissioners, straight-forward forms, and educational events. The Commission hosts an Annual Cranberry Congress Day in February using “top notch speakers” from all across North America and Canada. The timing of the event works well, it is very well attended and feedback is always positive. The Commission hosts a well attended bi-annual Field Day to share ideas and connect sector stakeholders. The Commission AGM is held on the same day as the BCCGA AGM and includes educational speakers. Growers appear to understand what the Commission does.

Weaknesses

Not all growers engage in the learning opportunities; this contributes to crop and farm inconsistencies. There are also concerns regarding farm succession i.e. knowledge transfer, asset transfer, new relationship development, etc.

Threats

Government funding could decline for this area of projects.

Opportunities

Along with current actions, new opportunities to educate growers include shifting the BCCMC newsletter to an e-news, eventually using the Research Farm to host Field Days and developing an Interpretation/ Education Corner at the Research Farm. Although more growers appear to understand what the Commissions does, more education in this area could be done. It would also be healthy to prioritize services and programs to be prepared for budget cuts should crops not meet expectations, and to develop a sustainability strategy for grower education programs should government support decrease i.e. explore co-op advertising, local sponsors, ticket sales, etc. Evaluating “what growers know” would help to develop education material which would impact crop consistency, and workshops addressing farm succession would be useful.

INDUSTRY RELATIONS

Strengths

All BC cranberry farmers, producer-vendors and agencies are licensed with the BCCMC. There is good communication, and the BCCMC practices a high level of transparency resulting in membership trust and support. There have been very few complaints or contentious issues with growers, producers, or agencies, and those that have arisen are dealt with effectively. It was said: "The cranberry group is a great group of growers to work with." The license application process is clear, consistent and transparent. The BCCMC is respected as the leader in the BC cranberry industry and BCFIRB, the overseeing body, has had no complaints. Ocean Spray, the main marketing channel, and the Commission maintain a transparent, supportive loyalty to one another. Strong relationships exist with the BCCGA, the CCGC, and federal and provincial agencies, and the CMC and the CI in the United States.

Weaknesses

The successful maintenance of all these relationships could be jeopardized should the General Manager successor lack this area of expertise.

Threats

The USA could close the border to all Canadian cranberry products. As well, Quebec sells only 5% of their cranberries to Ocean Spray while the remainder independently market to the east coast of Canada and the USA, and Europe. Quebec also doesn't pay into collective research done in the USA. Differentiating the Quebec strategy from BC practice impacts perceived loyalty.

Opportunities

There is an opportunity to develop strong working relationships with other cranberry growers by being transparent in planning and actions, by attending CCGC meetings, and encouraging growers to attend industry events. The Ocean Spray relationship can be maintained by attending meetings and including their representative on BCCMC committees. Relationships with CMC and CI can be maintained by attending meetings and funding their projects. Efforts can be made to ensure the GM successor is competent in relationship management with all stakeholder groups.

PROMOTION

Strengths

The Director of Communications (DC) applies a wealth of industry knowledge and experience, and enthusiasm to projects. She attends a variety of conferences and events throughout the year. Her tasks are outlined and consultation is held with the GM on new ideas. A wide variety of promotional materials have been developed: the website, newsletter, the BCCMC Booth (banner stands), health information sheets, recipe brochures, bookmarks, and industry information sheets, etc. The generic promotion of cranberries and the industry has been well done. The public is genuinely interested in the growing and harvesting of cranberries and information is well received through the media (they seek out cranberry news during harvest).

Weaknesses

There are no consumer sales measurements of activities; therefore, the cost/benefit of PR activities is unknown. There is also no coordinated approach to good or bad news stories. There appears to be a lack of definition between BCCMC activities, roles and responsibilities and those of the BCCGA which sometimes causes duplication with communication campaigns and media inquiries. The Director of Communications is not included in all parts of Commission meetings which results in adhoc PR planning and vague expectations. Finally, it is difficult to leverage "buy local" initiatives because the BC cranberry can not be promoted as BC product as most of it goes to the USA.

Threats

First, other berry products are competition. Consumers are also seeking low-sugar products and many cranberry products contain a significant amount of sugar/sweetener. Another issue is that too much PR may create a demand in BC that can't be filled. Finally, government funding may decline for this area of work.

Opportunities

Some significant changes would be to include the Director of Communications in an annual planning meeting(s) to align PR actions with Commission tasks and goals. Also developing a media response plan and a sustainable funding strategy i.e. co-op advertising, sponsors, etc. would help prepare for the future. A report about the BCCMC strengths and achievements could be circulated to build grower awareness about the Commission.

There continues to be the need to build consumer awareness, however, a shift from promoting the farmers and their families and the positive environmental stewardship of the industry and what cranberry farms contribute to their communities would be beneficial. It is still valuable to continue to spark consumer interest in cranberries by redoing the "Cranberry Whole Dinner" recipe set, updating recipes, and promoting new products with samples, etc. There is still the need to focus on the health benefits of the product, new low-sugar/diet products, how all fruit has sugar and the fact the Ocean Spray uses Canadian product.

New PR options include: Research Farm tours, developing an "Education Corner" for schools and tourists to view, circulating an industry report about research projects, what growers are actually doing, etc., and holding a media day at a cranberry field at harvest in the fall. Current activities should continue. (Field tours have been very difficult to arrange due to liability issues.)

ORGANIZATIONAL CAPACITY

(Includes Human Resources, Governance, Finance and Regulatory aspects.)

Strengths

The Commissioners said it best: "Overall, I feel that the BCCMC is well organized, well funded and very well run," and "regarding any possible needed changes, I truly cannot think of any one thing that I would do differently or in addition to what we are doing." COMB's 2011 organizational review of the BCCMC revealed outstanding results.

- The current management and staff are very competent, highly efficient, motivated and take the initiative to "get things done with excellence" and within budget. The General Manager has excellent communication skills to work with the variety of stakeholders; he takes a calm, professional and orderly approach and is well respected in the local and national agribusiness industry.
- Commissioners represent a good cross section of the industry. Each one has taken their role and responsibilities seriously and all work well together. The present number and structure of the current committees works well and the workload is balanced. A Code of Conduct and Conflict of Interest policies exist. All decisions are made on the basis of the best course of action for the BCCMC to follow. Planning involves a review of the budget and programs the first meeting after the AGM. The process to establish Committees, and appoint the Chair and Commissioners is well established and followed.
- Stable funding over the past nine years has supported an aggressive set of goals and a variety of services. The Commission is funded through annual license fees from growers,

producer-vendors and agencies, and levy revenues of \$0.38 cents per 100 pound barrel from all growers. The funding agreement with IAF for the past 6 years has been valuable.

- The BCCMC evaluates the regulations, General Orders and licensing process on a regular basis to ensure relevance. Changes are recommended and made in a timely manner.

Weaknesses

- There is a void with staff job descriptions, work plans, operational planning, and reporting. There is also no formal Commission planning meeting or Annual Workplan. It has been difficult to find and encourage new Commissioners. According to the COMB review there is a need for a "New Commissioner" orientation program, an ongoing professional development program for Commissioners, and clarification of Commissioner duties, responsibilities and expectations. Also Committees need to provide more information with their recommendations.
- The funding arrangement with IAF, which supports many programs, will conclude in 2012.
- The Scheme amendment is still pending provincial government approval.

Threats

In general there is the threat every time the government changes as it may be decide to eliminate all boards and commissions. This is a very good reason to maintain participation in COMB and to be prepared to endorse Commissions.

- The ongoing effectiveness of the organization lays on the shoulders of the upcoming the new Chairperson and it will be a steep learning curve for the replacement. The BCCMC has limited influence in this Provincial Government selection process. As well, some of the current Commissioners will retire and finding volunteer replacements may not be easy.
- If there is another short crop in 2011 then BCCMC revenues will decrease and it will need to draw on financial reserves again or cut services. Government funding could decline. The value of the U.S. dollar could have a negative impact on sales.

Opportunities

- It will be beneficial for HR to prepare a staff succession and transition plan by creating job descriptions for all staff, updating contract templates (include annual performance review expectation), and developing an Operations Manual and annual workplan. When the time comes, it will be valuable to investigate staffing the Research Farm with retiring government employees who may want to work part-time.
- It will also help to prepare a Chair transition plan i.e. encourage the General Manager to stay on board for a few months into 2012 to provide orientation to the new Chair.
- Commissioner succession planning and tools are needed i.e. consider increasing number to allow for succession overlap, implement a planning process (this is a critical tool for successive human resources who will need what to do and when) and attend COGA leadership and governance workshops. Ensure Commissioners are prepared with regular reporting of achievements and challenges, and strategic plan progress.
- To maintain services it would be practical to prioritize programs and services. Continuing to look for funding partnerships with the Growing Forward program, IAF, Organic Sector Development Program (IAF), sponsorships, etc. and developing a sustainability strategy for research farm will assist with long term financial stability.
- Maintain efforts regarding the Scheme amendment application to clarify regulatory issues and the Special Advisor appointment. There is still the opportunity to develop policies to integrate specialty products such as organic produce.

Appendix A: Statistics

The data below varies from the BC chart to Statistics Canada due to collection method variances.

BC Production and Acreage

Year	Production (barrels)	Acreage
2010	643,987	6,508
2009	788,418	6,129
2008	693,290	5,916
2007	792,132	5,870
2006	764,106	5,846

Canadian Cranberry Industry

Data as at December 31, 2010

	Bearing area		Marketed production			Mkt	Farm gate value
	acres	hectares	tons	metric tonnes	pounds	Share	(cdn\$)
British Columbia	5,814	2,353	40,303	36,562	80,802,020	48%	\$ 48,903,000
Alberta	-	-	-	-	-	0%	\$ -
Saskatchewan	-	-	-	-	-	0%	\$ -
Manitoba	-	-	-	-	-	0%	\$ -
Ontario*	-	-	-	-	-	0%	\$ -
Quebec	4,198	1,699	37,119	33,673	74,417,330	45%	\$ 20,750,000
New Brunswick	500	202	4,298	3,899	8,616,790	5%	\$ 2,260,000
Nova Scotia	205	83	1,028	933	2,061,930	1%	\$ 1,324,000
PEI	84	34	375	340	751,400	0%	\$ 224,000
Newfoundland*	-	-	-	-	-		\$ -
TOTAL				75,407	166,649,470	100%	73,461,000

Statistics Canada (February 2011). "Fruit and Vegetable Production"

* suppressed to meet the confidentiality requirements of the Statistics Act, not significant

Appendix B: Growers, Producer-Vendors and Agencies

A complete list of growers/licensees and current details can be found at the BCCMC website:

<http://www.bccranberries.com/growerlist3.html>

Producer Vendors	Products
Coast Cranberries	Fresh and Frozen Cranberries Cranberry Concentrate Cranberry Juice
Fort Wine Co Inc	Fresh and Frozen Cranberries Cranberry Wines Specialty Products
Gouwenberg Farms	Fresh Cranberries
Maybog Farms Ltd	Fresh Cranberries
Pacific Cranberry Co	Fresh Cranberries
Parsat Enterprises Ltd.	Fresh and Frozen Cranberries
Yellow Point Cranberries	Fresh and Frozen Cranberries Specialty Products Tours, Gift Shop Culinary Events

Agencies	Products
Lucerne Foods	Fresh and Frozen Cranberries
Ocean Spray of Canada	Fresh, Frozen and Dried Cranberries Cranberry Juice
Pacific Canadian Fruit Packers Inc	Fresh, Frozen and Dried Cranberries
Pacific Coast Fruit Products Ltd	Cranberry Juice Concentrate Cranberry Juice Single Strength Cranberry Juice Blends (as per customer specs) Cranberry Puree Concentrate Cranberry Puree Single Strength Pasteurized QF Cranberries Whole Cranberry Pomace Cranberry Essence

Appendix C: Research Project Summary (2006 - 2012)

- Yr 1** Genetic Codes for Cranberry Types
 Assessment of Tipworm Damage
 Intro of IPM & Weed Control
 Screening Trials for chlorimuron/ diazinon
 Cranberries - Prevention of Breast Cancer
 Cranberry Juice as an Anti Body Response
- 2** Screen New Reduced Risk Pesticides for Tipworm
 Testing Varietal Purity
 Compendium of Cranberry Diseases
 Bio Control of Dearness Scale
 Biology/Life Cycle Cranberry Tipworm/Relationship to Cranberry Plant Phenology Degree Days
 Investigation of the Causal Agents Associated with Cranberry Dieback Disorder
 Chemical Control of Tipworm
 Development of Effective Strategies to control Girdler and Perennial Weeds
 Trials to Support Registration of Mesotrione and Callisto
 Identification of an IPM Program for Creeping Buttercup and other Weeds
 Research Decision Making
 Health - Cranberry Proanthocyanidins
 Health - Cranberry for Oral Cand idosis
 Health - Cranberries against Food Poisoning
- 3** Develop of effective management strategy for tipworm/weeds
 Invest of causal agents assoc with cranberry dieback
 Sparaganothis fruitworm
 Using plant development stages to control tipworm
 Reproductive behaviour of tipworm
 Trials to support Canada registration of reduced risk
 Development of effective strategies for girdler
 Bacterial cell metabolism
 Cranberry Juice and Rotavirus
 Cranberry flavonoid consumption
- 4** Tools for Girdler Mgmt
 Cranberry Dieback Disorder
 Cranberry Tipworm
 Sparaganothis Fruitworm
 Cranberry Tipworm - Location
 Trials for Cdn Registration
 Fireworm & Perennial Weeds
 Response to Immune Cells
 Stomatitis & Gingival Fibroblasts
- 5** Cranberry Dieback Disorder - Control Techniques
 Control of Weevil, Fireworm & Yellow Loosestrife
 New Chemical Screening for Control of Weeds & Insects
 Cranberry Girdler - Organic Controls
 Cranberry Tipworm - Pheremone Testing
 Irrigation Effectiveness Survey
 Improved Cranberry Yield with Honeybees
 Cranberry Proanthocyanidins - Biofilm Formation
- 6** Cranberry Dieback Disorder
 Effective Controls for Insects and Weeds
 Sparaganothis Fruitworm
 Fungal Pathogens
 Pheremone for Tipworm
 Diazanone
 Cranberry Materials Against Bacterial Infections

Appendix D: PR Activities Summary

This list, provided by the Director of Communications, is detailed but not inclusive.

2006

- Logo/Identity, website and recipe development began.
- Sponsorships and partnerships i.e. ABC Country Restaurants, industry trade shows in BC and Canada, food industry memberships, and information needs were surveyed.
- Educational sessions such as the Cranberry Congress were initiated.
- Discussions with Richmond Nature Park re: a Cranberry Interpretive Centre began.

2007

- The BCCMC logo, website, presentation folder, industry information sheet including the Cranberry Institute items, and display booth were completed, and the image bank began.
- The BCCMC sponsored a cooking stage at the 15th Annual Wellness Show in March.
- Industry Fast Facts Sheet and media release distributed to media in March.
- The BCCMC Director of Communications attended the Dieticians of Canada, BC Regional Conference and the Canadian Society of Clinical Nutritionists Conference. The Dieticians of Canada displayed BCCMC banner ads on their website until April 2008 (the site received 22,000 visits per month). The BCCMC sponsored the Walk-About Lunch and provided cranberries.
- Recipes were completed for printed materials for consumers and health professionals.
- Discussions with Ag in the Classroom re: school tours occurred.
- Discussions with Richmond Nature Park re: a Cranberry Interpretive Centre continued.
- Information was streamed thru local print media and radio, CBC radio, Global News, CTV News, and Breakfast TV in September and December 2007.
- Food industry memberships acquired (BC Chefs Assoc. and Baking Assoc. of Canada).
- Photos (over 4,000) were shot to develop an image bank for various uses.
- Great Cranberry Harvest video slide show developed.

2008

- Sponsored the Wellness Show Cooking Stage.
- Attended BC Foodservice Expo distributed industry and health information and sampled cranberry salsa.
- Chefs and students completed a tour/visit of cranberry harvest.
- Chef instructors at 4 high schools used fresh cranberries (Ag in the Classroom pilot).
- Dieticians across Canada received a health information mail out and the BCCMC had a booth at the Dieticians of Canada BC Regional Conference in March 2008.
- Updates and maintenance of other promotional tools took place.
- The "Cranberry Whole Meal" brochure was developed and a total of 7500 recipe brochures have been printed and distributed between 2008 and 2010.
- Memberships maintained with BC Chefs Association and Baking Association of Canada
- Attended the Dieticians of Canada National Conference and BC Regional Conference, distributed health and industry information and sampled products.

2009

- The Grower Congress was held in February with speakers from all across North America.
- Sponsored the Wellness Show Cooking Stage.
- Sponsored the BC Chefs Hot Competition at BC Foodservice Expo.
- The annual Dietitians National Conference, BC Regional Dietitians Conference and Eat! Fraser Valley showcased the booth and industry, product and health information.
- Attended the Baking Association of Canada's Annual Congress in Burnaby, BC
- The BCCMC provided the "BC Chefs Association Cranberry Commission Scholarship".
- The BC Cranberry Field Day was held.
- Participated in the Ag in the Classroom's "Take a Bite of BC" program, provided industry information and product.
- Other promotional activities i.e. media drops, news releases, updates continued.
- BCCMC Mincemeat tart recipe appeared in the Province Newspaper.
- Memberships maintained with BC Chefs Association and Baking Association of Canada.

2010

- Sponsored the Wellness Show Cooking Stage.
- Sponsored the BC Chefs Hot Competition at BC Foodservice Expo.
- The BCCMC had a booth at the 2010 Olympics Table Top Exhibition.
- The Grower Congress was held in February.
- The “Sharing a little of the Great Cranberry Harvest” video was distributed to media.
- Other promotional activities i.e. media drops, news releases, updates continued.
- Participated in the Ag in the Classroom’s “Take a Bite of BC” program, provided industry information and product.
- The annual Dietitians conference and Eat! Fraser Valley showcased the booth and industry, product and health information. Ten gift baskets were donated for first Eat Fraser Valley Media contest.
- BCCMC recipe for Cranberry Coffee Cake appeared in Bakers Journal (national) both print and online versions.
- Memberships maintained with BC Chefs Association and Baking Association of Canada.

2011

- The Grower Congress was held in February.
- Participated in the Ag in the Classroom’s “Take a Bite of BC” program, provided industry information and product.
- The BCCMC provided prizes and cranberries for the Junior Chefs Hot Competition.
- Executive Chef of the Fish House did the Cranberry Cooking stage at the 19th Annual Wellness Show; attendance was 32,068 (an increase of approximately 10%).
- Cranberries were on the menu and in the recipe book at the Canadian food promotion booth at the Croatian retailers event.
- The Director attended the Dietitians of Canada Annual Conference with a new brochure on cranberry health benefits and Craisin samples; over 700 Dietitians visited the booth.
- The BCCMC sponsored Junior Chef events at the 48th Annual Canadian Culinary Federation (CCFCC) Conference which the BC Chefs’ Association hosted in June.
- Memberships maintained with BC Chefs Association and Baking Association of Canada.

Appendix E: BCCMC Strategic Priority Budgets

STRATEGIC PRIORITY #1 SUPPORT COMPETITIVE PRODUCT DEVELOPMENT

	Year 1 / 2012		Year 2 / 2013		Year 3 / 2014		Year 4 / 2015		Year 5 / 2016	
	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC
Build Research Farm*	50,000 W.E.D.	50,000	50,000 W.E.D.	50,000	50,000 W.E.D.	50,000		100,000		100,000
Production Research	50,000 IAF	50,000	50,000 IAF	50,000	50,000 IAF	50,000	25,000 IAF	25,000	25,000 IAF	25,000
Health Research		20,000		20,000		20,000		20,000		20,000
Grower Education:										
Congress Day	3,500 Partner	6,500		10,000		10,000		10,000		10,000
Field Day				12,000				12,000		
Grower Knowledge Study	2,500 IAF	2,500								
Succession Workshops	2,500 IAF	2,500								
Total	\$108,500	\$131,500	\$100,000	\$142,000	\$100,000	\$130,000	\$25,000	\$167,000	\$25,000	\$155,000

*Some funds will be paid out in 2011 i.e. BCCMC \$50,000 and W.E.D. \$50,000

STRATEGIC PRIORITY #2 FACILITATE A THRIVING INDUSTRY

	Year 1 / 2012		Year 2 / 2013		Year 3 / 2014		Year 4 / 2015		Year 5 / 2016	
	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC
Foreign Promotion		45,000		45,000		45,000		45,000		45,000
Domestic Promotion		35,000		35,000		35,000		35,000		35,000
Economic Impact Study			2,500 IAF	2,500						
Total		\$ 80,000	\$ 2,500	\$82,500		\$80,000		\$80,000		\$80,000

STRATEGIC PRIORITY #3 MAINTAIN A LEADING ROLE IN THE INDUSTRY

	Year 1 / 2012		Year 2 / 2013		Year 3 / 2014		Year 4 / 2015		Year 5 / 2016	
	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC	Partner	BCCMC
Strategic Plan Update & Next Plan					1,500 IAF	1,500			3,000 IAF	3,000
Total					\$ 1,500	\$ 1,500			\$ 3,000	\$ 3,000

References and Literature Review

- AAFC: Agri-Food Trade Service (2011-08-05). *Canadian Cranberries: A Tart Treasure*. <http://www.ats.agr.gc.ca/pro/5321-eng.htm>
- AAFC. *Growing Forward*. <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1200339470715&lang=eng>
- BCCMC (2006). Strategic Plan, Don Cameron Associates.
- BCCMC (2008). Strategic Plan, revised.
- BCCMC Budget 2009, 2010 and 2011.
- BCCMC Minutes January 2010 – May 2011; AGM Minutes February 2010 and 2011
- BCCMC (2011). *Statistical Report to the 2011 Cranberry Commission AGM*.
- BC Cranberry Marketing Commission Consolidated General Orders March 16, 2005. See link: <http://www.bcveg.com/docs/Consolidated%20Order%20-%20April%2026,%202009%20%20incl%20Amending%20Order%2021.pdf>
- BC Cranberry Marketing Scheme. See link: <http://www.bccranberries.com/pdfs/Cranberry%20General%20Orders%202010.pdf>
- BC Farm Industry Review Board (BCFIRB). See link: <http://www.firb.gov.bc.ca>
- BC Ministry of Agriculture (2011). *Agriculture & Food Fast Stats*. See link: http://www.agf.gov.bc.ca/publicat/stats/FastStats2010_R.pdf
- BC Ministry of Agriculture. *Fruit, Vegetables and Field Crops*. See link: <http://www.agf.gov.bc.ca/aboutind/profile.htm>
- Council of Marketing Boards (2011). *BC Cranberry Marketing Commission Summary*.
- Food Foresight (2011). *Food Foresight 2011 Trends Intelligence Report*. See link: http://www.foodforesight.com/priority_trends.html
- Natural Products Marketing (BC) Act, R.S.B.C. 1996, c.330. See link: <http://www.canlii.org/en/bc/laws/stat/rsbc-1996-c-330/latest/rsbc-1996-c-330.html>
- Ocean Spray Cranberries, Inc. (2011). *Crop Forecast Summer 2011*.
- Statistics Canada (2006). *Census of Agriculture*. See link: <http://www.statcan.gc.ca/ca-ra2006/analysis-analyses/bc-cb-eng.htm>
- Statistics Canada (2006). *Census of Agriculture: Fruits, berries and nuts*. See link: <http://www.statcan.gc.ca/pub/95-629-x/5/4182701-eng.htm>
- Statistics Canada (February 2011). "Fruit and Vegetable Production". Retrieved May 2011. Online at: <http://www.statcan.gc.ca/pub/22-003-x/22-003-x2010002-eng.pdf>
- Statistics Canada (2011). *Fork in the road: Canadian agriculture and food on the move*. See link: <http://www.statcan.gc.ca/pub/96-325-x/2007000/article/10646-eng.htm>
- Statistics Canada, CATSNET Analytics (2011). *Canadian Imports of Cranberries from all Countries*.

Websites

- Agriculture and Agri-food Canada (2011-08-05) <http://www.ats.agr.gc.ca/pro/5321-eng.htm>
- BC Cranberry Marketing Commission, Abbotsford, BC. See link: www.bccranberries.com
- British Columbia Cranberry Growers Association, Langley, BC. See link: www.bccranberrygrowers.com
- Ocean Spray Canada. See link: www.oceanspray.ca