

Réseau de recherche pour mesurer la  
DIFFÉRENCE COOPÉRATIVE



Measuring the Co-operative Difference  
RESEARCH NETWORK

## **Canadian Agricultural Co-operatives: Trends and Challenges, 1992-2008**

**By Luc Theriault and David Bent**

**University of New Brunswick, Fredericton**

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## **Introduction:**

- The agricultural sector in Canada comprises some of the oldest and largest co-operatives in the country.
- Very few data analyses have been recently presented of on these co-operatives and this descriptive research intends to contribute to close that gap.
- Using survey data provided by the Co-operatives Secretariat, we focus on the 1992-2008 period and seek to identify some key trends in terms of the growth (or lack thereof) in the number of co-operatives, their volume of business, the size of their membership, as well as the number of Canadians they employ.
- More detailed financial information are also examined for this period.
- This analysis is performed first overall for Canadian agricultural co-operatives, and then is broken down by geographic regions and by sub-sectors of activities, such as farm supplies, processing and marketing, and support to agriculture.
- In the end, the trends identified are discussed in view of how they might inform us on the challenges that agricultural co-ops will face in the next decade.

## **Overall Trends:**

National Trends are quite sporadic, at times up and at times down, more ebb and flow than anything else. Agricultural and Farm Supply co-ops do fare better overall, even showing signs of growth in business, if not in numbers and members.

The West, surprisingly given its agrarian history, shows a great deal of vulnerability. During the last two decades the post-war trend of farm consolidation and declining numbers continued, cutting into co-op members and profits. Furthermore, several prominent agricultural co-operatives have been privatized in recent years (aided by the predominance of Neo-Liberal thought in the provincial governments), culminating in an overall trend of decline, although some show rough stability. Still, despite the decline in numbers and members, business volume shows signs of growth, or at least consistently.

Quebec shows the most striking growth of all the regions. Numbers grow almost consistently in all quarters. Business has been aided by Quebec co-operatives buying up co-operatives from outside the province, particularly in Ontario. Provincial governments, of all stripes, have also helped by aiding co-operatives with friendly legislation and even grants, as they view co-operatives as a means of promoting provincial economic self-sufficiency. The levels of growth vary from component to component, but the overall trend is clear.

Ontario co-ops, more or less, show continuous growth in all quarters. Members, numbers, and business are grow steadily throughout this time, although some prominent co-operatives have

been privatized or bought out in this time. The only exception is Farm Supply co-ops which show a steady decline, perhaps reflecting a decline in overall farm numbers, while those remaining are more productive.

Atlantic region shows the same trend of growth, but not as large as in Quebec. Again some components are more sporadic than others, but the overall trend of growth is clear.

Various types: *Vegetable Co-ops* show consistent decline in all components, but with a slight recovery towards the end of the period under examination. *Dairy, Poultry, and Egg Co-ops* mostly hold steady, with some ebbing and flowing in all components. *Grains, Oilseeds, Honey, and Maple Co-ops* show consistent decline (perhaps reflecting the decline in the west). *Livestock Co-ops* show decline in the 90s, but growth in the early 2000s. *Fruit Co-ops* more or less remain steady in their numbers, despite some mild ebbing and flowing either way. *Farmers Market Co-ops* show decline in the 90s and early 2000s, but begin to rise towards the end of the period. Finally, *Tree Farming Co-ops* show near consistent growth.

1) **Processing and Marketing Stats:** Refers to the processing of agricultural products (including Christmas trees) and or their sale – includes the marketing of unprocessed agricultural products either directly or not which includes farmers markets (Ex. Dairy & Poultry Products, Grains, Oilseeds, Honey & Maple Products, Fruits & Vegetables, Farmers' Markets).

#### a) **Number of Incorporated Co-ops**

**National:** The trends are varied and sporadic. The numbers of incorporated co-ops show a more or less steady increase, though the numbers remain rooted in the 300 range. Beginning with 362 in 1992, it veers down to 348 in 1996. Numbers begin to recover until they hit their peak in 375 in 2000, then decline once more to 335 in 2005. They then again recover to 370 in 2008.

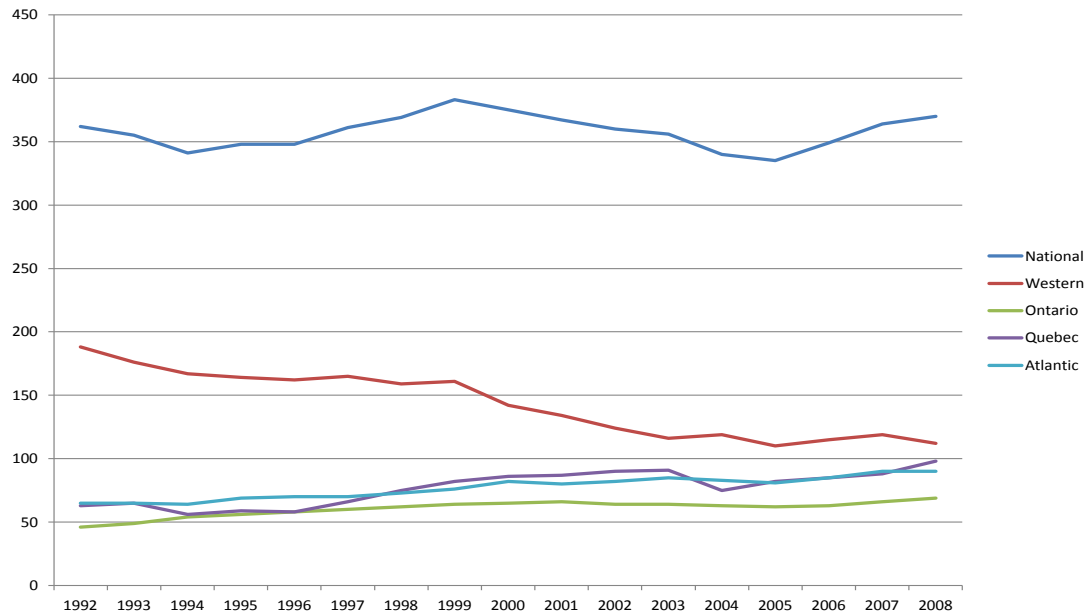
**Western:** The numbers of incorporated co-ops show a downward trend in the 1990s, but hold steady in 160s range throughout. But there is a sharp and steady decline in aughts, down from 142-112 btw 2000-08.

**Ontario:** The numbers of incorporated co-ops show steady increase, from 46 in 1992 to 69 in 2008, though there is a slight decrease in early aughts (66 in 2002 to 62 in 2005).

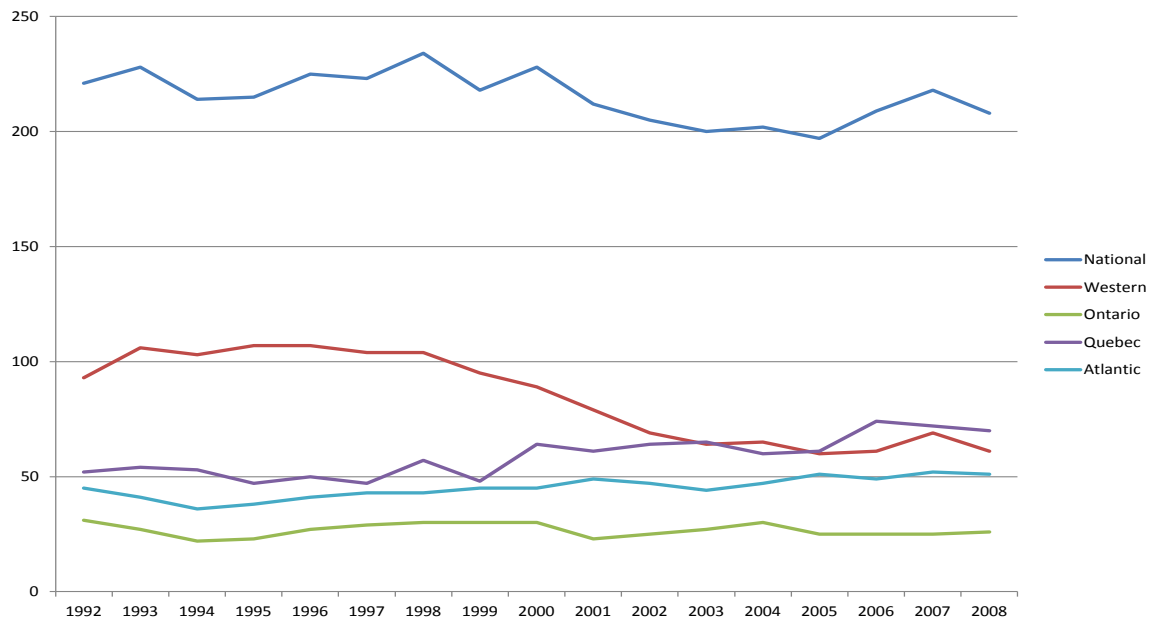
**Quebec:** The number of incorporated co-ops were slumping in 1990s, going from 63 in '92 to 66 in '97, but then grow from 75 in '98 to '91 in 2003. They then slump once more to 75 in '04, but at 98 in '08.

**Atlantic:** Number of incorporated co-ops show more or less steady growth, from 65 in 1992 to 90 in 2008. But there were slumps in 94, 01, 04-05.

## Number of Incorporated Co-ops



## Number of Co-ops Reporting



## b) Volume of Business

**National:** The volume of business throughout this period is more sporadic. It rises throughout the 90s, from 10,727 in 1992 to 15,612 in 2000, but then declines through aughts to 8,177 in 2007, but rises to 9,298 from 2007-08.

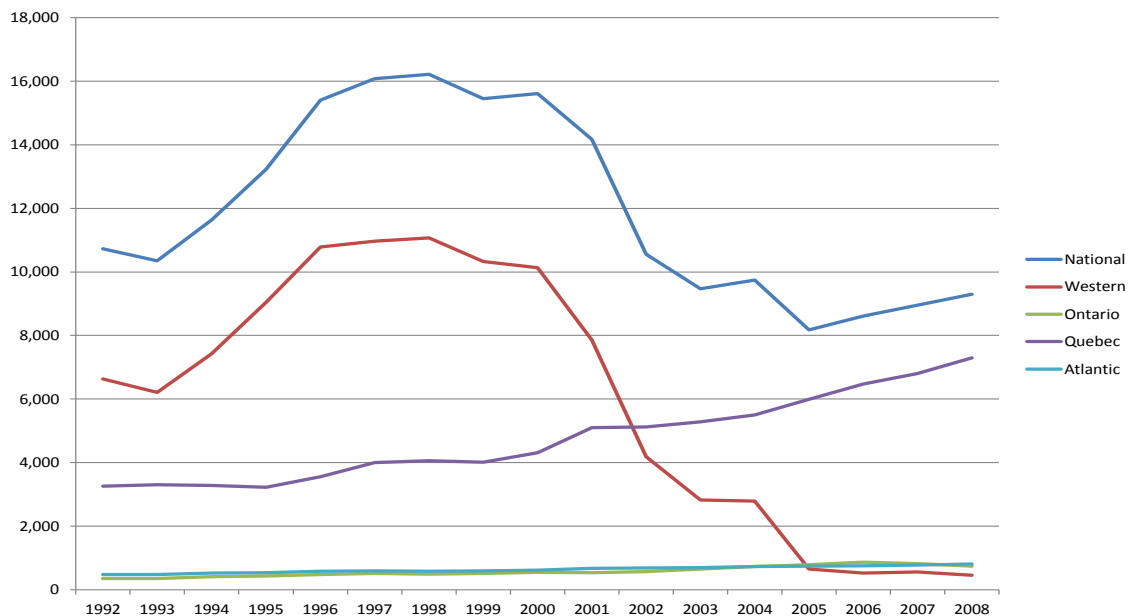
**Western:** Business shows a steady rise from 92-98 (6,633-11,073), but then wavers in 10,000 range from 99-00, with a sharp decline in aughts (7,854 to 453 btw 2001-08)

**Ontario:** Business also shows steady rise, even during early aughts slump, 349 to 740 btw 1992-2008, the peak is in 2006 at 867.

**Quebec:** Business shows steady growth, even in during the slump in co-op numbers, going from 3,202 to 7,297 btw 1992-2008.

**Atlantic:** Business shows steady growth, 483 in 92, 809 in 08; but a slump in 98.

## Volume of Business (in millions of dollars)



## c) Members

**National:** Membership shows steady and striking decline throughout the period. Beginning with 238 in 1992 each successive year shows decline, except for a slight rise from 1996-98 (205-217).

There is a sharp decline from 2001-02, 204-116, and it craters from then on out, ending with 38 in 08.

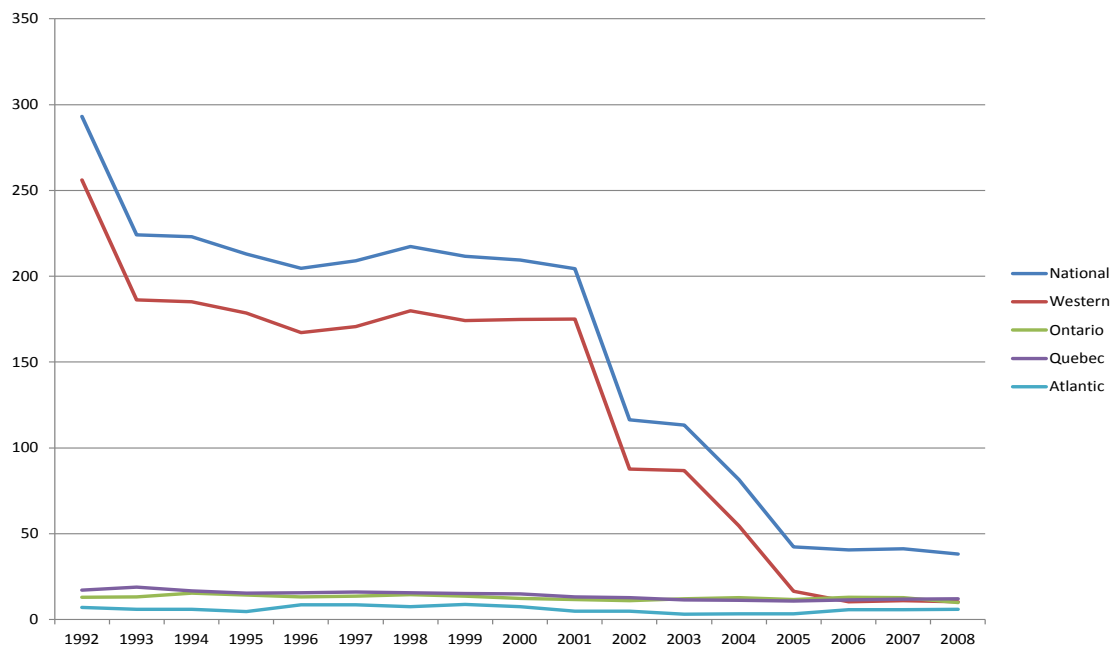
**Western:** Members show a sharp drop from 92-93 (256 to 186), stays in 170 range until 2001, there's then a sharp to 88 in 2002, 54 in 2004, it then plummets to 16 in 2005, and 10 in 2006.

**Ontario:** Members ebb and flow in 1990s, mostly in the 13-15 range. They go down to 12 in 2000, but holds from 11-13 until 2008 when they declines to 10.

**Quebec:** Membership mostly shows decline, though there is a rise from 17 in '92 to 19 in '93. It then hovers around 15 and 16 until 2000, and is stagnant around 11-13 for aughts.

**Atlantic:** Membership was back and forth in the 90s, 7-5 from 1992-95, 9 in '96 then 9-7 until 2001. After a dramatic drop to 5 in 2001 then 3 in 2003, it then hits 6 in 2006 and stays there for the rest of the period.

## Members (in thousands)



### d) Employees

**National:** Employee numbers are more sporadic. There's a decline from 1992-95, from 28,395-25,777, then there's a steady rise to 30,963 by 2001, steady growth from 91-01, then its more or less down until at 23,827 in 2008 (but there is a slight rise from 2005-06, which matches the slight spike in business at this time).

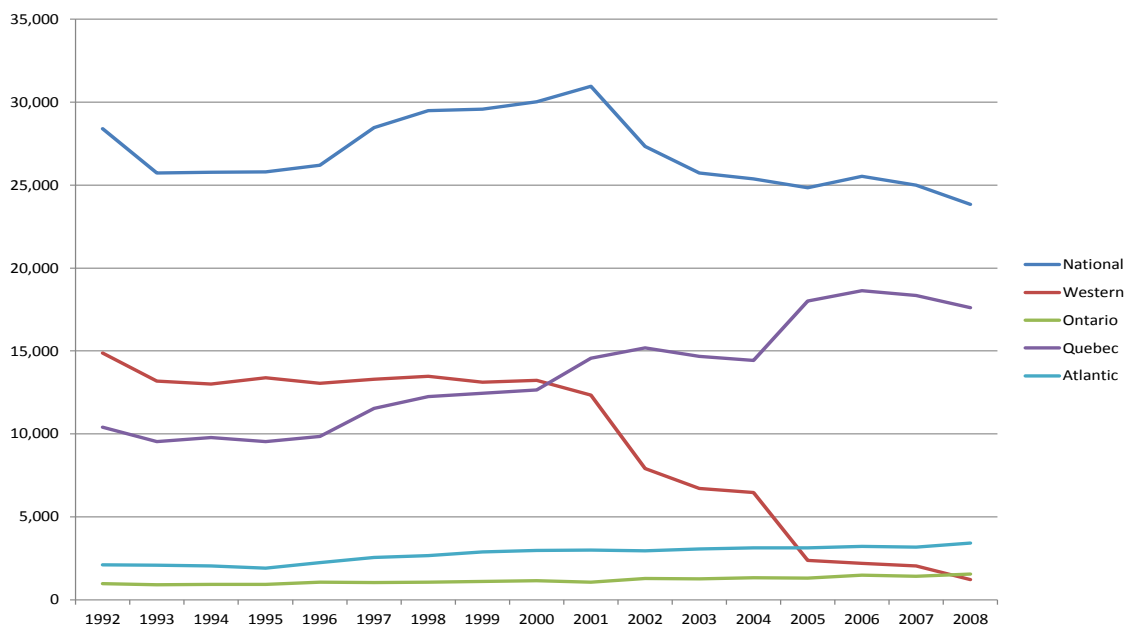
**Western:** Employees numbers show a slight drop from 1992-93 (14,887 to 13,180), they're steady in 13,000s until 2000, but there's then a sharp drop to 7,920 in 2002, it then plummets to 1,232 in 2008.

**Ontario:** Employees show sustained growth, though some years show slight decrease. 984-1558 from 1992-2008.

**Quebec:** Employees hover around 9000 until '97 when they jump to 11,000 range, they then enjoy steady growth, 17-000 to 18,000 by 2008.

**Atlantic:** Employee numbers show more or less consistent growth, from 2,107 in 1992 to 3,429 in 2008, though 1992-95 do show a trend of decline, before a rebound begins in 1996.

## Employees



### e) Finances

**National:** Revenue plummets from 1992-95, 2,115 to 1,276, but shoots up until 1998 (2,196), then down again to 2003 (1,211), up in 2004 (1,375), down to 991 in 2005, slight rise thereafter, ends at 1,077 in 2008. Assets, liabilities, and equity show steady rise in 90s, slight decline from 2000-01, steep decline in 02, steady decline until 2006 (matches 1993).

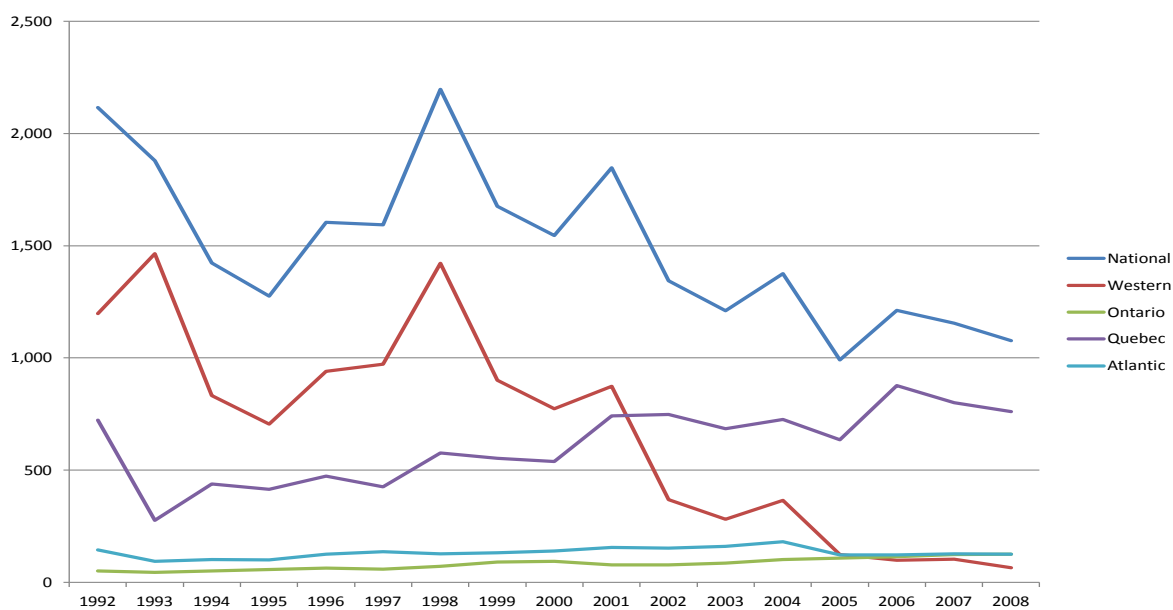
**Western:** Revenue is sporadic in 1990s, some years stronger than others, range of 900-1,100, peaks in 1993 and 1998 (1,465 and 1,421), sharp drop from 2001-02 (873 to 365), this continued in aughts, it's down to 65 in 2008. Steady rise in assets in 90s, 2,199 to peak of 3,904 in 99, slight decline in 00-01 (to 3,220), then plummets from 1,625 to 128 in 08. The same trend is seen in Liabilities and Equity.

**Ontario:** Revenue is steady, with sporadic growth in 1990s, shoots up in 99 (91), again in 04 (102), steady growth after that, ending at 126 in 2008. Same trends in expenses, assets, liabilities, and equities.

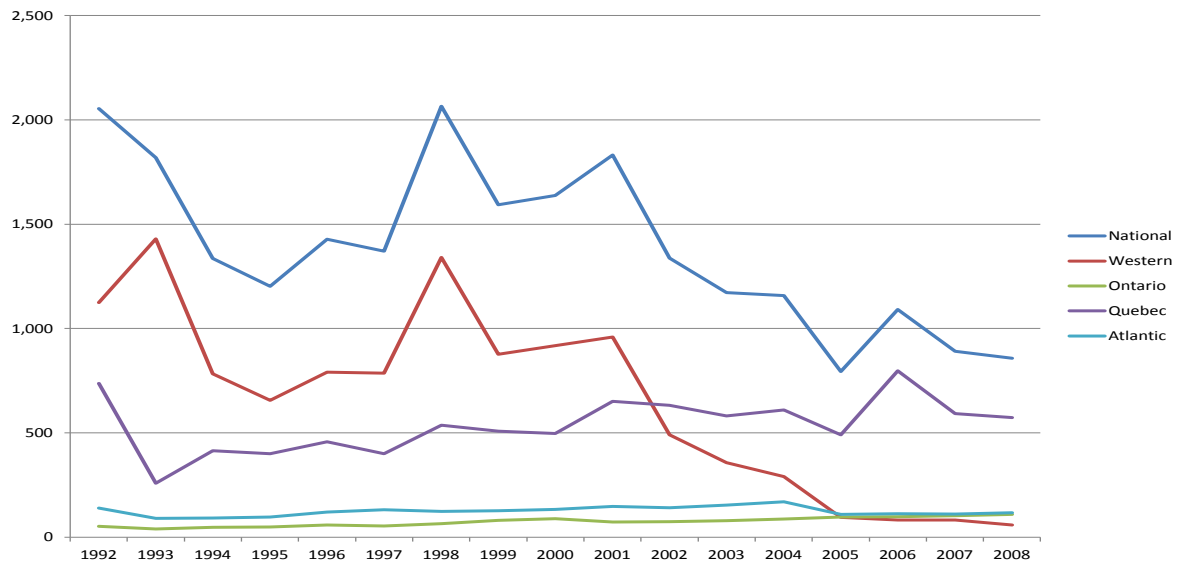
**Quebec:** Revenue drops sharply from 1992-93, 723 to 276, but then shows steady rise, hitting 742 in 2001. It hovers there with some growth, hitting 876 in 08. There is a similar trend in expenses. Assets, liabilities, and equity show steady growth, with slump from 93-94.

**Atlantic:** Revenue is sporadic; at 144 in 1992 but then down to 94 in 1993, it is then more or less up to 2004, when it hits 181, but then drops down to 120s range. Same trend in expenses. Assets, liabilities, and equity show continued growth.

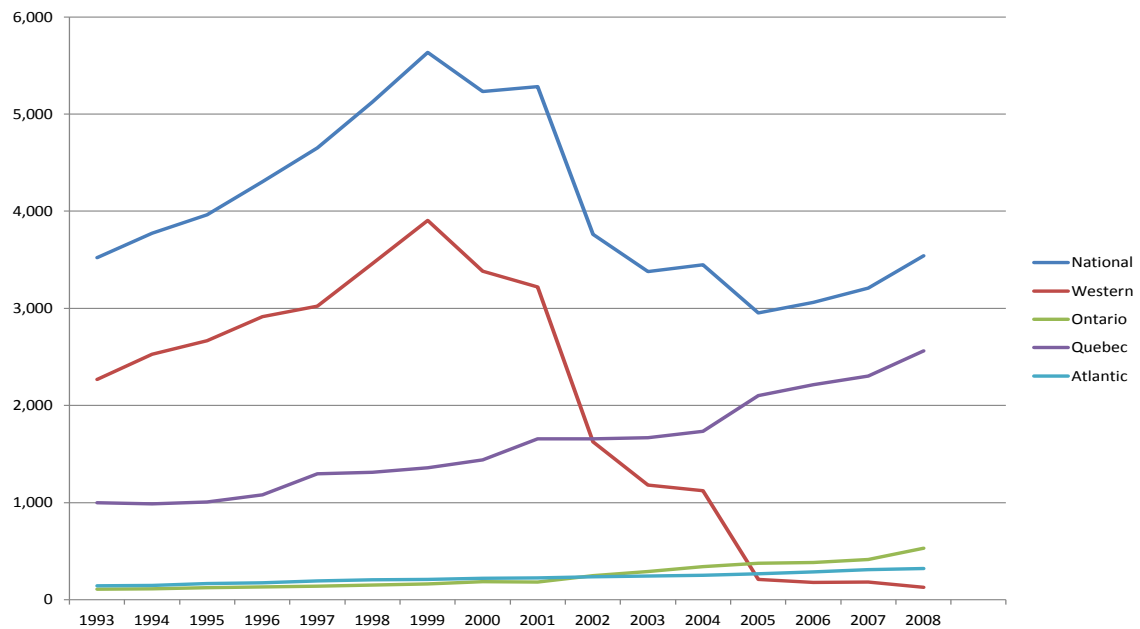
## Gross Revenue (in millions of dollars)



## Gross Expenses (in millions of dollars)



## Assets (in millions of dollars)



2) **Agricultural Co-ops Stats:** Refers to co-operatives that provide goods or services to farmers; they are involved in the following: farming, farm supplies, services and other support to agriculture, and processing and marketing of farm products are excluded, co-ops involved in the agri-food sector and that do not have a direct link to farmers: - ex: worker co-ops involved in processing food and or beverages (pastry, beer, etc).

#### a) Number of Co-ops:

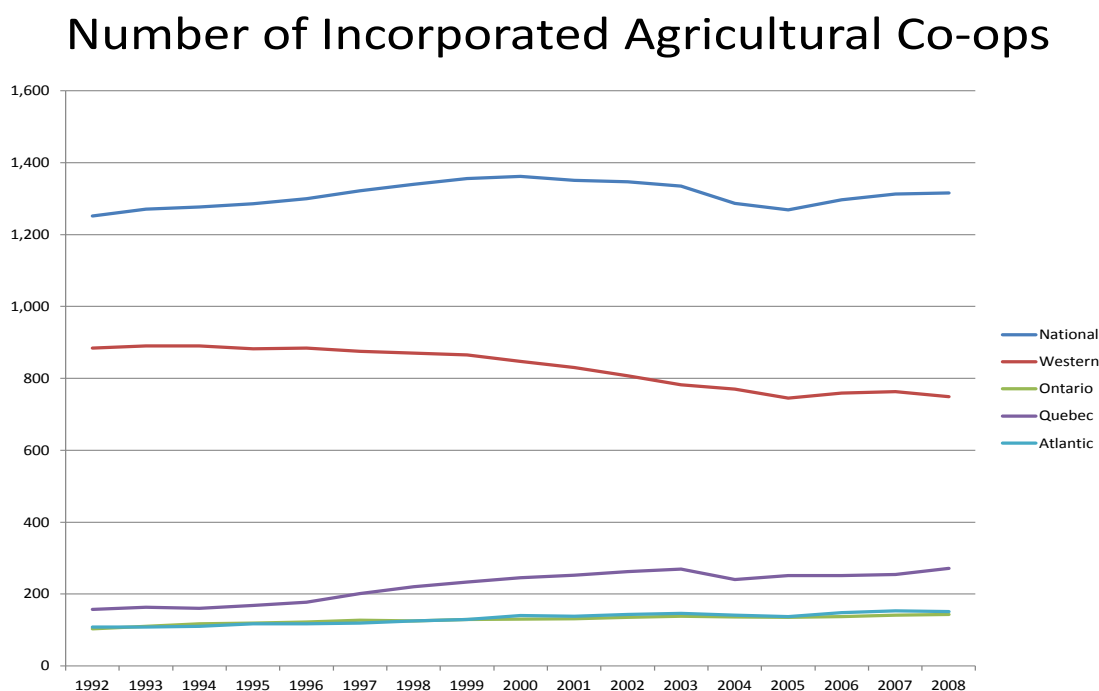
**National:** Number of incorporated co-ops show steady growth from 1992-2000, 1,252 to 1,362, then decline to 1,269 in '05, up to 1,316 in 08.

**Western:** Numbers of incorporated co-ops are in high the 800s from 1992-2000, they then drop to low of 745 in 2005, and hover in that area until 2008 (749).

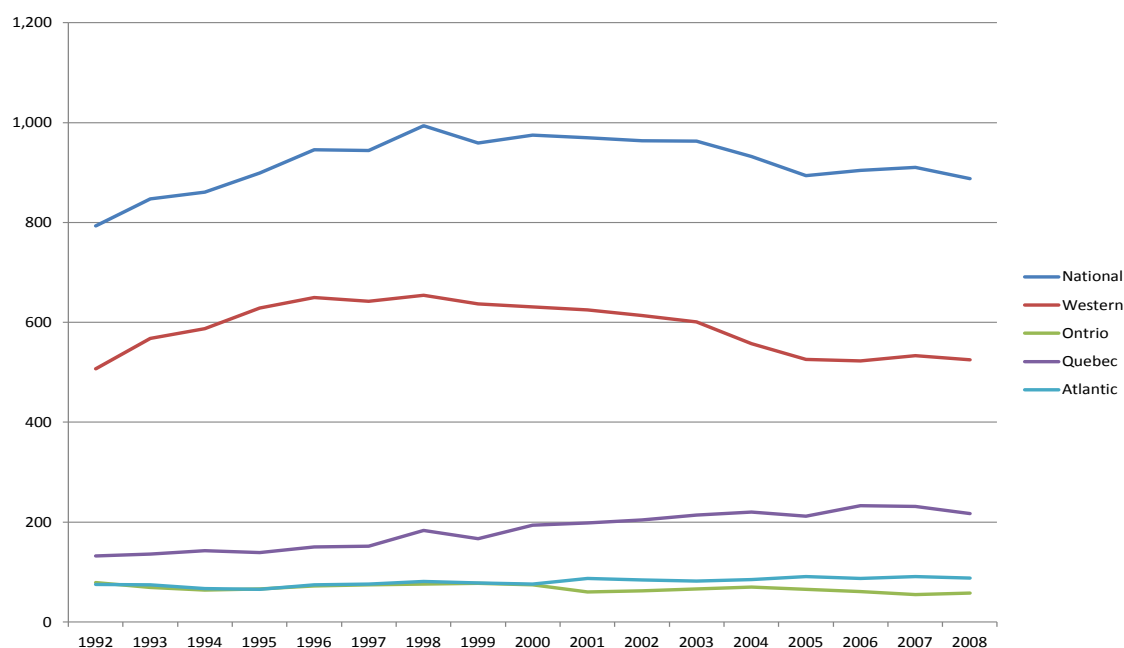
**Ontario:** Number of incorporated co-ops show more or less steady rise from 103-143, but with minor slumps from 97-98 and 03-06.

**Quebec:** Number of incorporated co-ops slumps from 1993-94 and 2003-04, but overall show consistent growth throughout the period, 157-271.

**Atlantic:** Number of incorporated co-ops show steady growth, 108-151, with slumps in 2000-01 and 2003-05.



## Number of Agricultural Co-ops Reporting



### b) Volume of Business

**National:** Shows steady growth from 1992-2000, but then declines until '05, but then recovers to '08.

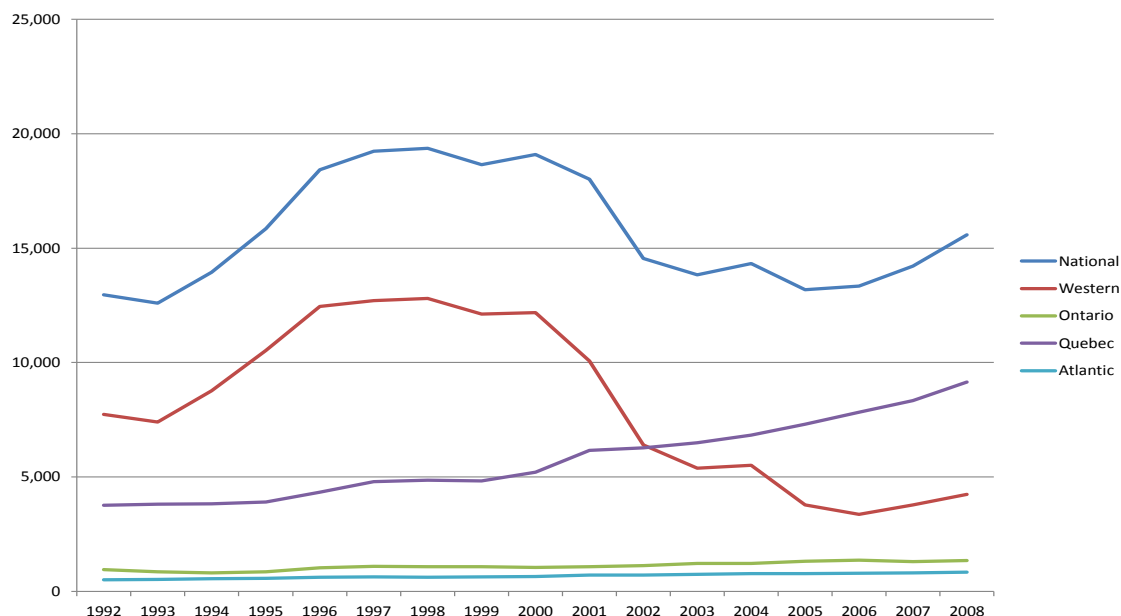
**Western:** Business shows steady growth from 1992-98, 7,736 to 12,806, then drops to 10,071 in 2001, this drop continues to 2006 when it hits a low of 3,366, a recovery then begins which sees it rise to 4,238 in 2008.

**Ontario:** Business numbers show a more or less steady rise, with minor slumps from 97-98 and '03-06.

**Quebec:** Business shows consistent growth as well, with a slight slump from 1998-99; overall going from 3,764-9,144.

**Atlantic:** Consistent growth in business, going from 513-846, only slump btw 1997-98.

## Volume of Business (in millions of dollars)



### c) Membership

**National:** Membership is more sporadic, dropping from 1992-93, 661-543, then hovering in 500 range until 2002 when it drops to 477, but recovers ground by 2005, reaching 513.

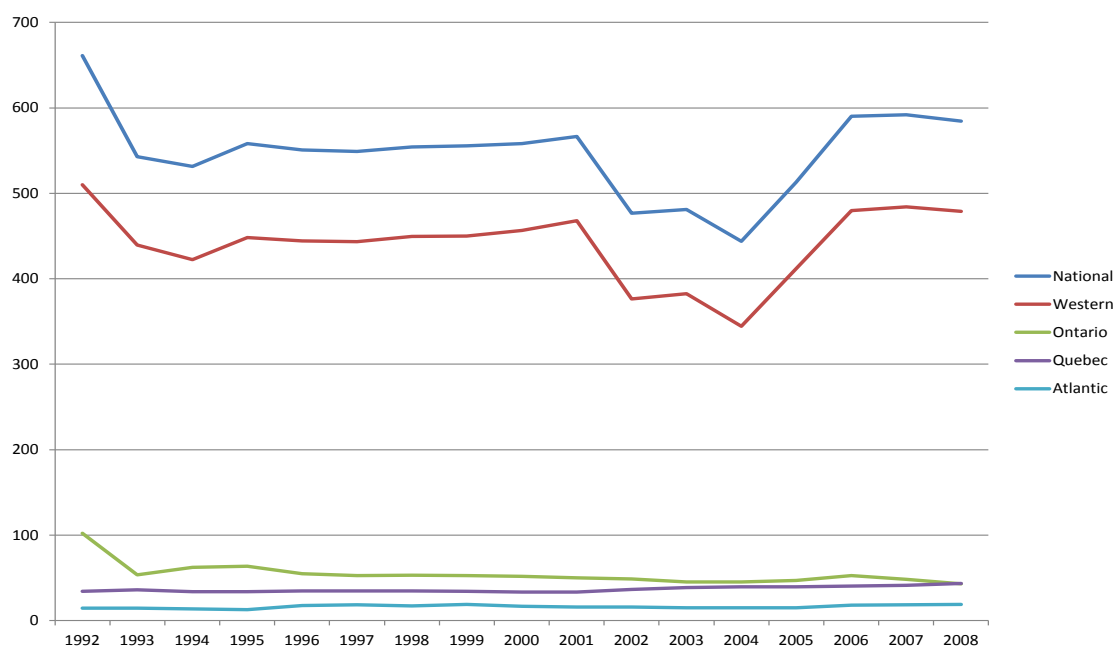
**Western:** Members numbers stay constant in the 400 range during the 1990s, after a drop from 510 to 434 in 1992-93. There is then a sharp drop from 2001-04, the low point of 344 being hit in 04. It then enters into a recovery, reaching 484 in 07.

**Ontario:** Membership shows steady decline, sharp drop from 1992-93, 102-54, it then hovers in 60s and 50s for the remainder of the 1990s, and drops into the 40s for aughts, 43 in '08.

**Quebec:** Members numbers show slight growth, but more or less stay steady in highs 30s for the whole period, going from 34-44, with slight slumps from 1993-94 and 1998-01.

**Atlantic:** Membership numbers are more sporadic, down 15-13 btw 1992-95, shooting up to 18 in 1996, 19 in 1999, but then down to 17-15 btw 2003-05, before recovering to 18-19 in 2006-08.

## Members (in thousands)



### d) Employees

**National:** Employee numbers are sporadic; they drop from 1992-93 (34,884-31,972), then grow steadily to 2001 (hitting 38,673). There's a sharp drop to 33,792 in 2003 (from 35,469 in 02), and it hovers at that level until 2008, when it's at 32,049.

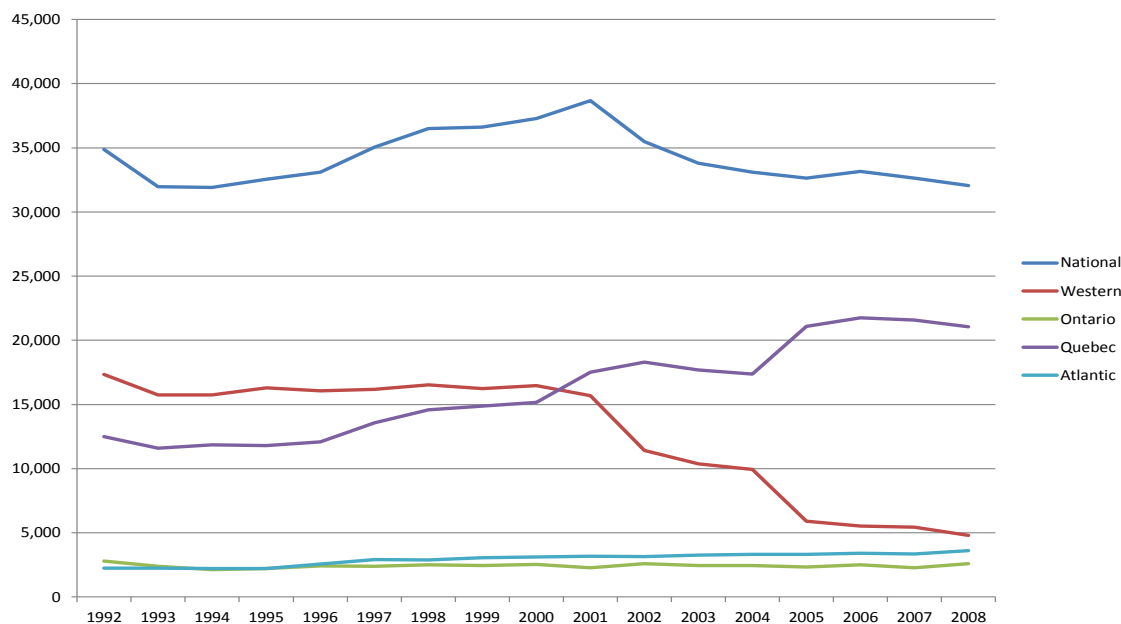
**Western:** After a drop in employees from 1992-93, 17,353 to 15,750, numbers remain steady in 16,000 range until 2001, when they drop to 15,686, then to 11,431 in 2002. This is followed by a steady decline to 4,794 in 08.

**Ontario:** Employees numbers hold steady in the low 2000s for the entire period, the only sharp drops are from 1992-93, 2,797-2,393, and 2000-01, 2,522-2,282.

**Quebec:** Employees show more or less consistent growth, going from 12,988-21,057, with slumps in 1993-95, 2002-04, and 2006-07.

**Atlantic:** Employee numbers are mostly up, growing from 2,246-3,609, with slumps from 1993-94, 1997-98, 2001-02, 2006-07.

## Employees for Agricultural Co-ops



### e) Finances

**National:** There's a decline in revenue from 1992-95, 2,546-1,807, then it rises to 2,807 in 1998. This is followed by a period of decline to 2003, when it hits 1,900, it hovers in this range until 2008. Same trend in expenses. Assets, liabilities, and equity show more or less steady growth from 1992-01, but with some slumps. All show a sharp drop in 2002, then hovering with slight growth until 08.

**Western:** Revenue is sporadic in 1990s, starts at 1,390, spikes to 1,690 in '93, then goes down to 1,090 in '94. It hovers in 1200 range until it spikes to 1,737 in '98, and then goes down to 1,193 in '99. After more hovering it then drops to 706 in '02, followed by a steady decline to 544 in '08. Same trend in expenses, assets, liabilities, and equity.

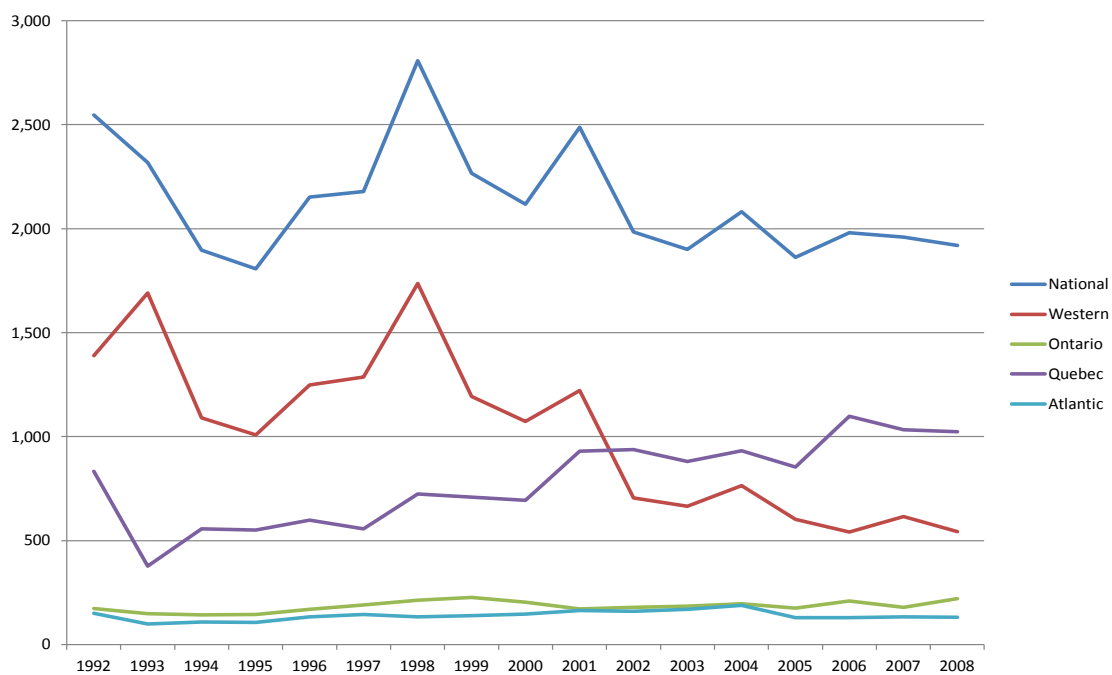
**Ontario:** Revenue is sporadic, ranging from the 170s to the low 200s throughout, peaking in 1999 with 226, low point in 1996 at 170; the same pattern is seen in expenses. Assets slump from 1992-94, 404-276, then steadily rise, 733 by 08 (slight slump from 2000-01), same trend in liabilities. Equity steady rise, 88-317, but slumps in 2000-01 and 2005-06

**Quebec:** There was a sharp drop in revenue from 1992-93, 832-378, followed by more or less consistent growth to 1,023 in 2008, (with slumps in 1994-95, 1996-97, 1998-99, with a peak of

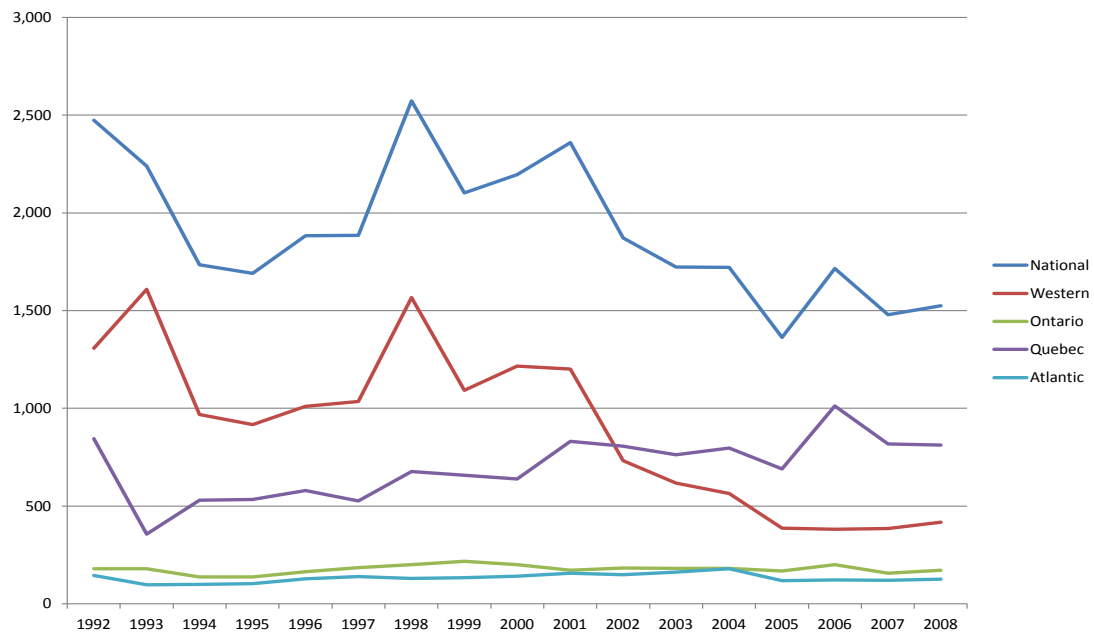
1,098 in 2006). Same trend in expenses. Assets, liabilities, and equity show consistent growth, after slight slump from 92-94.

**Atlantic:** Revenue fluctuates, there's a sharp drop from 1992-93, 150-100, then going up to 144 in 1997, it ebbs and flows until reaching its peak of 188 in 2004, followed by another decline to 130s, ending at 132 in 2008. Same trend in expenses. Assets, liabilities, equity all show continuous growth.

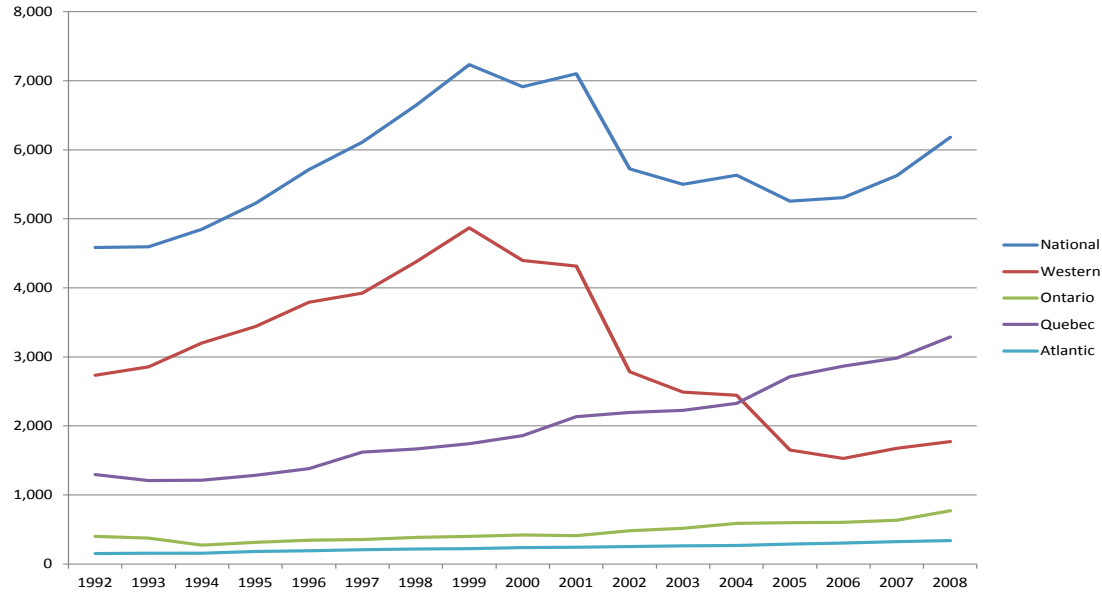
## Gross Revenue (in millions of dollars)



## Gross Expenses (in millions of dollars)



## Assets (in millions of dollars)



3) **Processing and Marketing Breakdown**: Refers to sector specific co-operatives.

**a) Number of Co-ops**

**Vegetables and Greenhouse Vegetables:** Numbers show a gradual decline from 1992-2008, 51-42, with the mid-40s the median range. There's a slight decline in early aughts to low point of 37, but it recovers to 42 by 2008.

**Dairy, Poultry, and Eggs:** Numbers are steady in low 40s and high 30s for most of 90s, spiking up to 47 in 1999. They then decline to 43 in 2000, but then rise up to 46 in 2002, declining again to 39 in 2005-06, recovering again to 41 in 2008.

**Grains, Oilseeds, Honey, and Maple:** Numbers show near consistent trend of decline, 45-29, hovering in the 40s throughout the 1990s, hitting the 30s in 2001.

Employees show sharp drop from 1992-93, 7,281-5,721, but it recovers to 6000 range for rest of 1990s. It drops down to 5,572 in 2001, and further down to 2,443 in 2002, 2,315 in 2003, to 369 in 2005. This is followed by a rise up to 1,185 in '06, but down to 422 to '07, up to 531 in '08.

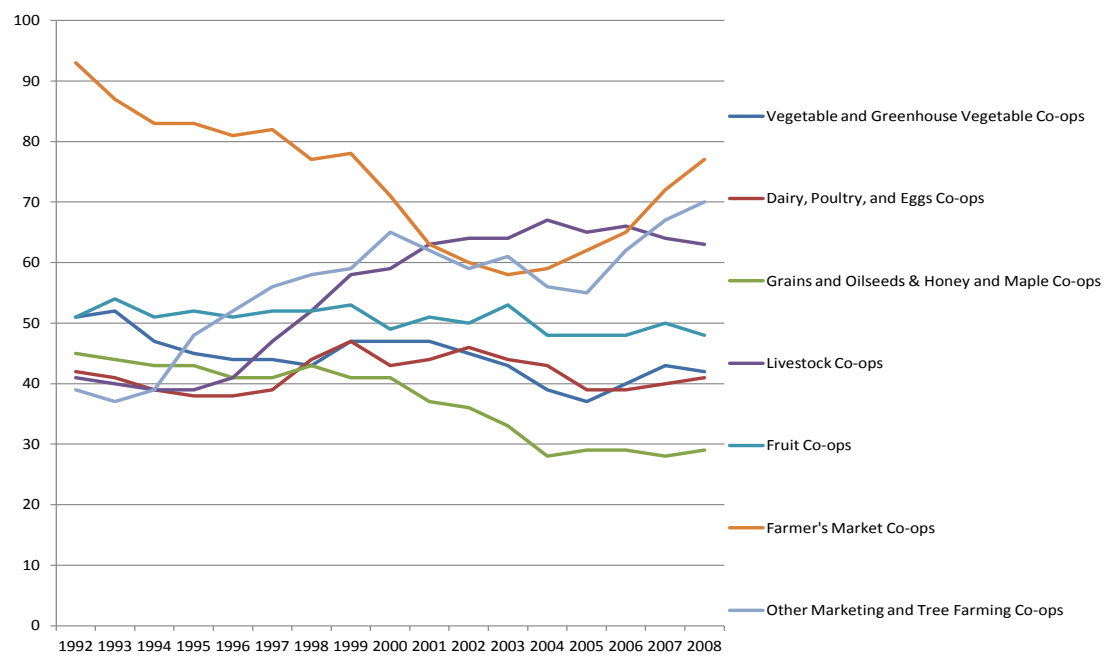
**Livestock:** Numbers hold steady btw 41 and 39 from 1992-96, but rise to the 60s range from 1997-01. This stature holds into aughts, with a peak of 67 in 2004. It ends at 63 in 2008.

**Fruits:** Numbers are consistent in the 48-53 range, with a peak of 54 in 93.

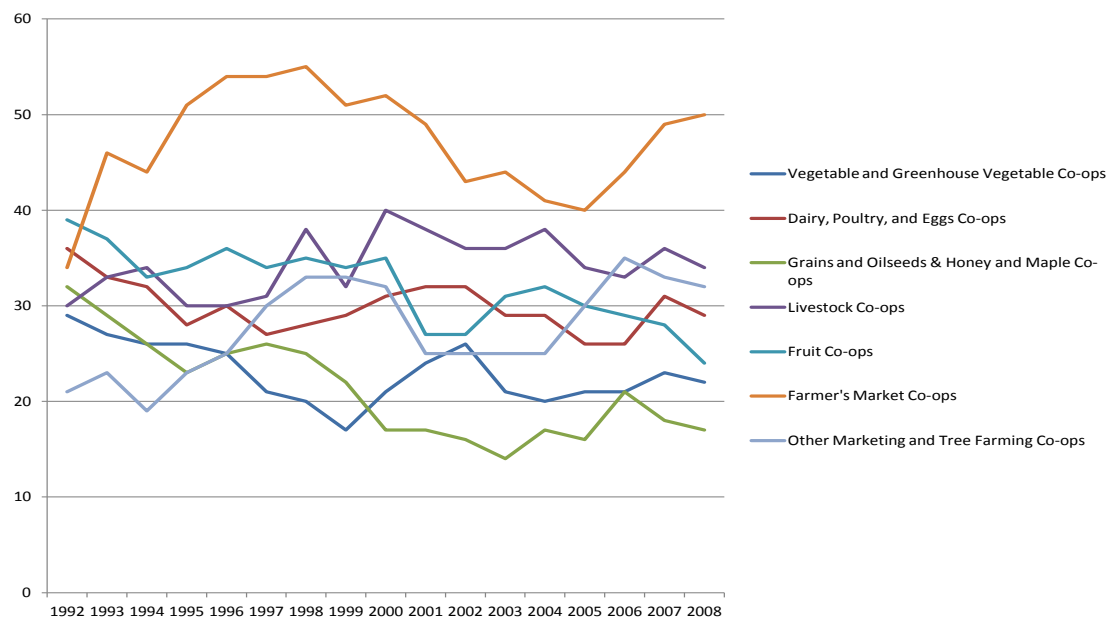
**Farmer's Market:** Numbers show a decline from 1992-98, 93-77, a slight recovery to 78 in 1998, but then down to 58 in 2003, and a rise to 77 in 2008.

**Tree Farm Marketing:** Numbers mostly show growth btw 1992-08, going from 39-70. There is some slumping from 2001-05, but it resumes growth by 2006.

# Number of Incorporated Co-ops



# Number of Co-ops Reporting



**b) Volume of Business:**

**Vegetables and Greenhouse Vegetables:** Business shows sharp decline over 1992-2008, 162-95, with a steady decline in 1990s, reaching 98 by 1999. The low point of 95 was hit in 02, but they recover to 115 by 2006, only to again decline to 95 by 2008.

**Dairy, Poultry, and Eggs:** Business numbers rise throughout 1990s, 3,735 in 1992 to 5,373 in 2000 (this rise is nearly continuous, but there is a slim decline from 1994-95, 3,974-3,951). There is decline to 4,280 in 2001, and numbers waver in 4000 range throughout aughts, rising from 2006-08, 4,113-4,943.

**Grains, Oilseeds, Honey, and Maple:** Business shows impressive growth from 1992-97, 4,926-9,196, but a decline begins in 1998, 9,164. It then goes down to 2,980 in 02. Further decline is seen by 2004 when it hits 1,641, which is followed by a sharp drop to 314 in 2005. The trend is then growth, going up to 587 in 2006, but then further decline to 226 in 2008.

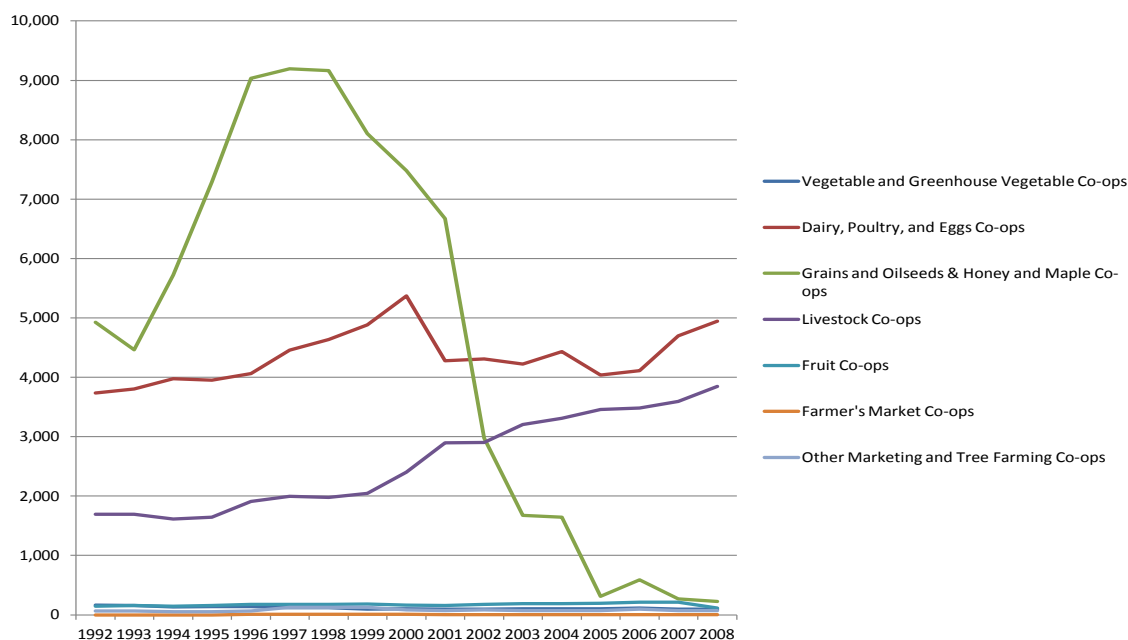
**Livestock:** Business shows almost consistent growth, 1,694-3,846, with slight slumps btw '93-94 & '97-98.

**Fruits:** Business numbers more volatile, going back and forth from the 140 to 150 range from 1992-95. They then go up to the 170-180 range from 1996-99, and then down to the 160-150 range from 2000-01. It then climbs to 216 from 2002-07, with a sharp drop to 133 in 2008.

**Farmers' Market:** After not registering from 1992-95, business spikes to 8 in 1996 and then 9 in 1997. It stays at 9 to 2001 when it crashes to 1. It then goes up to 2 in 2005, 4 in 2006, 6 in 2008.

**Tree Farm Marketing:** Business shows similar trend, but recovery from early aughts slump not as dramatic as the numbers; peak of 129 in 1999, ends at 69 in 08 (from 66 in 1992).

## Volume of Business (in millions of dollars)



### c) Membership:

**Vegetables and Greenhouse Vegetables:** Membership numbers are mostly consistent at 1, but rise to 3 from 1994-95.

**Dairy, Poultry, and Eggs:** Membership numbers decline from the highs of 26-27 in early 90s to 19 by 1995. It then wavers in high teens and early 20s until 2008, ends on 19 in 2008.

**Grains, Oilseeds, Honey, and Maple:** Membership numbers show an almost consistent decline from 1992-2008, 247-6, with a brief recovery in 1998-99, but then it goes down again (a sharp drop is seen in 2002 (78), to 7 in 2005, and 6 in 2008).

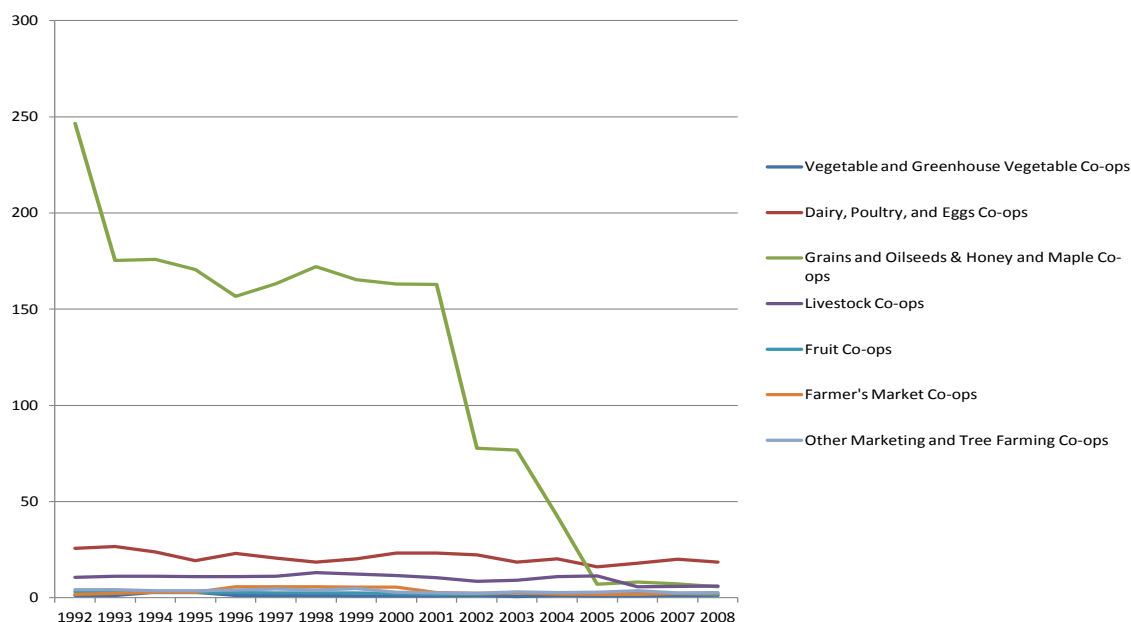
**Livestock:** Membership stays steady at 11 from 1992-97, but goes up at 12-13 from 1998-00. It goes down to 10-9 from 2001-03, but up to eleven from 2004-05. End at 6 from 2006-08.

**Fruit:** Membership numbers are steady at 3 from 1992-99, at 2 from 2000-07, and 1 in 2008.

**Farmers' Market:** Members show similar spike, 2-6 in 1992-96, but then drop from 6 to 3 btw 2000-01. It then goes up to 2 in 02, and stays there for the rest of the period.

**Tree Farm Marketing:** Membership numbers are at 4 for most of 90s (5 in 97 and 99), but dip to 3 in 2000 and remains so for most of aughts, (2 in 2002 and 4 in 2006).

## Members (in thousands)



### d) Employees:

**Vegetables and Greenhouse Vegetables:** Employee numbers show consistent decline, but its quite sporadic. There's a drop from 718 in 1992 to 440 in 1994, it varies from high 400s to 560 from 1994-98, with a sharp drop to 277 in 1999, and recovery to 439 by 2001. It stays in high the 300s and low 400s from 2001-07, followed by a sharp drop to 297 in 2008.

**Dairy, Poultry, and Eggs:** There is sporadic growth in employees through 1990s. There's a decline from 12,648 to 11,412 from 1992-96, then growth up to 13,725 in 2001, followed by a sharp decline to 9,094 in 2006. The pattern of growth in repeated up to 10,801 in 2007, and down once again to 10,211 in 2008.

**Grains, Oilseeds, Honey, and Maple:** Employees show sharp drop from 1992-93, 7,281-5,721, but it recovers to 6000 range for rest of 1990s. It drops down to 5,572 in 2001, and further down to 2,443 in 2002, 2,315 in 2003, to 369 in 2005. This is followed by a rise up to 1,185 in '06, but down to 422 to '07, up to 531 in '08.

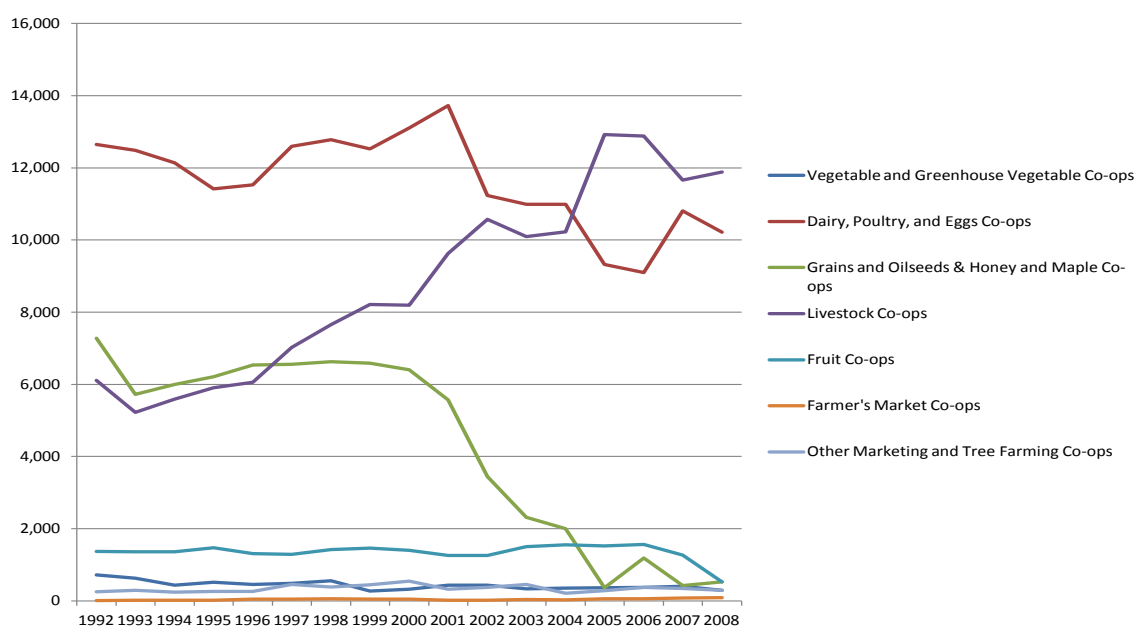
**Livestock:** Employee numbers fluctuate in 1990s, down from 6,107-5,223 in 1992-93, but then up to 6,062 by 1996. There is a near continuous rise from there on out (slumps in '99-00, '02-03), peaking in 2005 with 12,291, down to 11,881 by 2008.

**Fruit:** Employee numbers are steady at the 1200-1400 range from 1992-02, but then go up to the 1500 range from 2003-06, down to 1,275 in 2007, finally crashing to 527 in 2008.

**Farmers' Market:** Employees show growth spike in 90s, going from 9 to 56 btw 1992-98. It then goes down to 55 from 1999-00, and hits 20-24 in 2001-02. This is followed by a period of growth when it hits 89 in 2008.

**Tree Farm Marketing:** Employees in 200 range from 1992-96, spikes up to 456 in 1997, dips to 386 in 1998, then rises to 546 in 2000, down to 320 in 2001, up to 458 in 2003, down to 216 in 2004, up to 374 in 2006, down to 291 in 2008.

## Employees



### e) Finances:

**Vegetables and Greenhouse Vegetables:** Revenue shows arch of decline, recovery, then decline and recovery. It begins with a high of 34 in 1992, wavers from 26-31 btw 1993-96, drop to 21 in 1997, rise to 25 by 2000. Then comes a sharp drop to 13 by 2001. Reaching a low of 11 in 2004, there follows a rise to 18 by 2008. A similar pattern is seen in expenses. There is a sharp drop in assets from 53 in 1992 to a low of 30 in 1997. It then stabilizes in high 20s and low 30s, varying from year to year, ending on 28 in 2008. Same pattern in liabilities and equity.

**Dairy, Poultry, and Eggs:** Revenue shows spurts of growth and decline. A sharp drop from 1992-95, 851-441, is followed growth in spurts to 707 in 2001. It then hovers in 600s from 2002-04, followed by sharp drop to 353 in 2005, a rise to 502 in 2007, and then to 478 in 2008. The same pattern is seen in expenses. Assets, liabilities, and equity are more or less stable, but show decline from 1992-94, rise until 1999, decline and wavering from 2000-06, and rise until 2008

**Grains, Oilseeds, Honey, and Maple:** Revenue fluctuates in 1990s. It goes up from 738-1,169 from 1992-93, but down to 495 in 1995. It then goes up to 1,094 in 1998, but down to 630 in 2001. There is then a sharp drop to 180 in 2002, and 112 in 2003, but it recovers to 280 in 2006, but goes down again to 56 in 2008. Same trend is seen in expenses. Assets, liabilities, and equity shows dramatic growth from 1992-99, followed by a slight slump from 2000-01, and a crash from 2002-08.

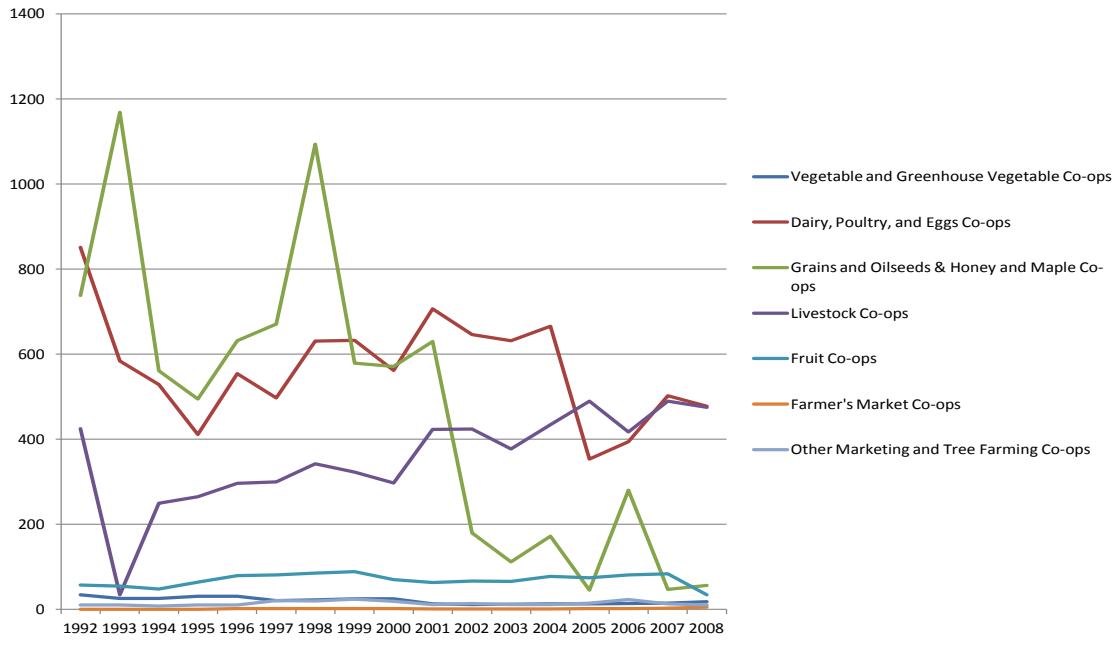
**Livestock:** Revenue shows dramatic drop from 1992-93, 425-34, then up again to 250 in 1994. It continues climbing to 342 by 1998, but then veers down to 297 by 2000. It then rises up to 423 by 2001, and stays in 400 range (save 2003), for the rest of the period, peaking in 2007 with 490. Same trend in expenses. Assets, liabilities, and equity slump in early 90s, but begin rising in 1997, keeps rising into '08.

**Fruits:** Revenue fluctuates widely; starting at 57 in 1992, it peaks at 89 in 1999, with a low of 34 in 2008. The average mean is in the high 60s to low 80s range. There is a sharp drop off from 84 to 34 in 2007-08. Same trend in expenses. Assets, liabilities, and equity show continuous growth from '92-07, with a sharp drop off in '08.

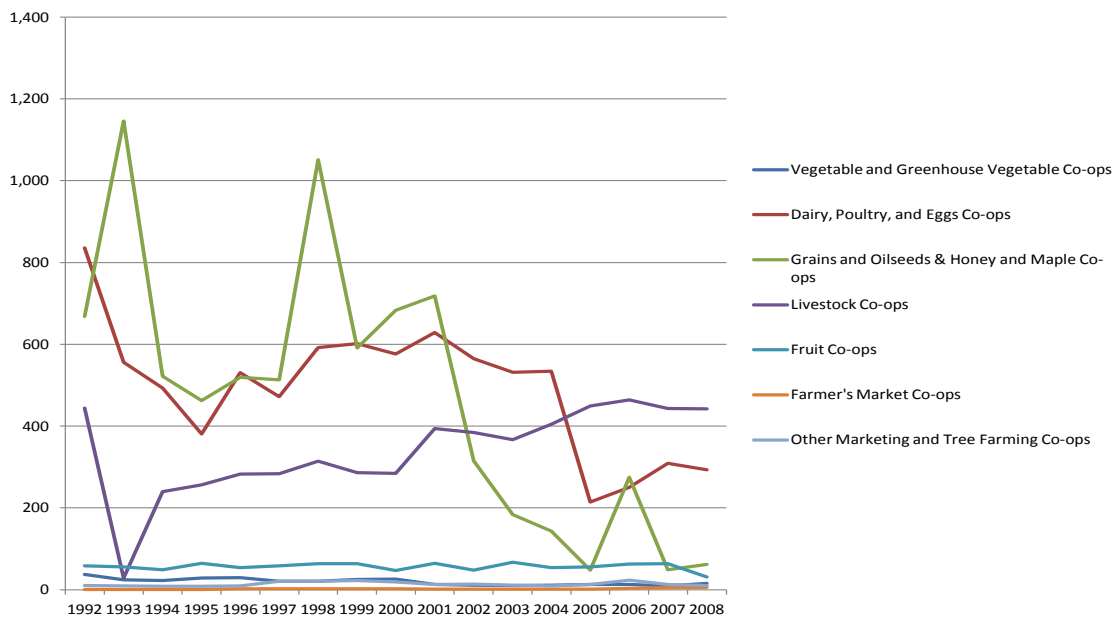
**Farmer's Market:** Revenue only registers in 1996 with a 2, and stays there until it hits 1 in 2001. It stays there until it grows from 2-5 btw 2005-08. Assets, liabilities, and equity show pattern of rising in late 1990s, but it tapers off in early aughts, only recovering by late aughts.

**Tree Farm Marketing:** Revenue is at 10 for most of the early 90s (8 in 94), but it spikes up to 21-24 for 1997-99. It then goes down to 19 in 2000, and 11 in 2001. It then spikes up to 23 by 2006, and then down to 10 by 2008. Same trend in expenses. Assets were in decline in early 1990s, but there was a sharp recovery in 1997. The peak years were in 1997-00, but it drops down high to the 20s range in the aughts, and stays there. Same trend are in liabilities and equity.

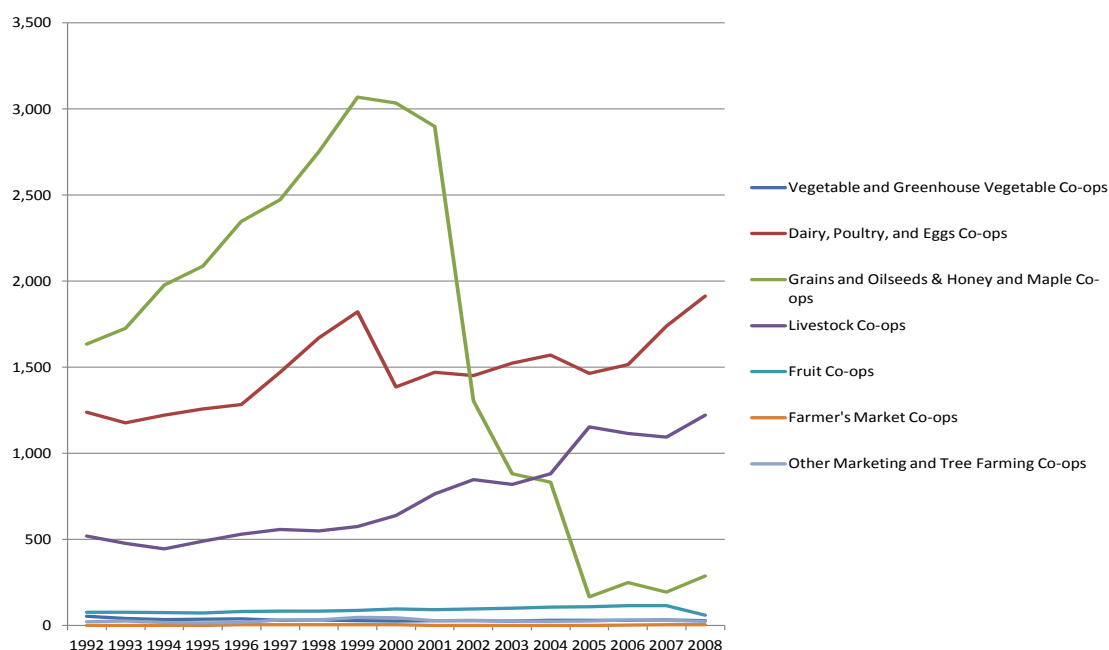
## Gross Revenue (in millions of dollars)



## Gross Expenses (in millions of dollars)



## Assets (in millions of dollars)



4) **Support for Agricultural Co-ops:** Refers to agriculture production or services related to agriculture production (ex: farms, collective pastures, feeder financing, machinery sharing, seed cleaning).

### a) Numbers of Co-ops

**National:** Numbers show growth from 1992-2002, 610-738, but it tapers off after that to low 700s and high 600s, it ends at 708 in 08.

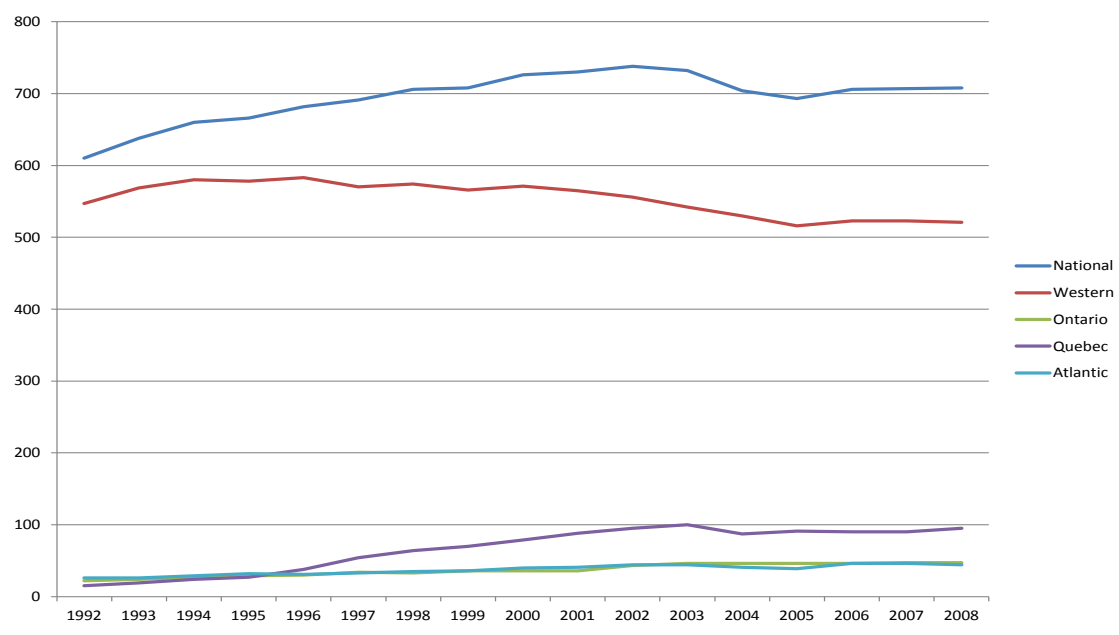
**Western:** Numbers are consistent in 500 range from 1992-08. There's growth from 547-583 in 1992-96, it then hovers in 560-70 range from 1997-01, and drops from 556-521 from 2002-08.

**Ontario:** Numbers show continuous growth throughout the period, 22-47.

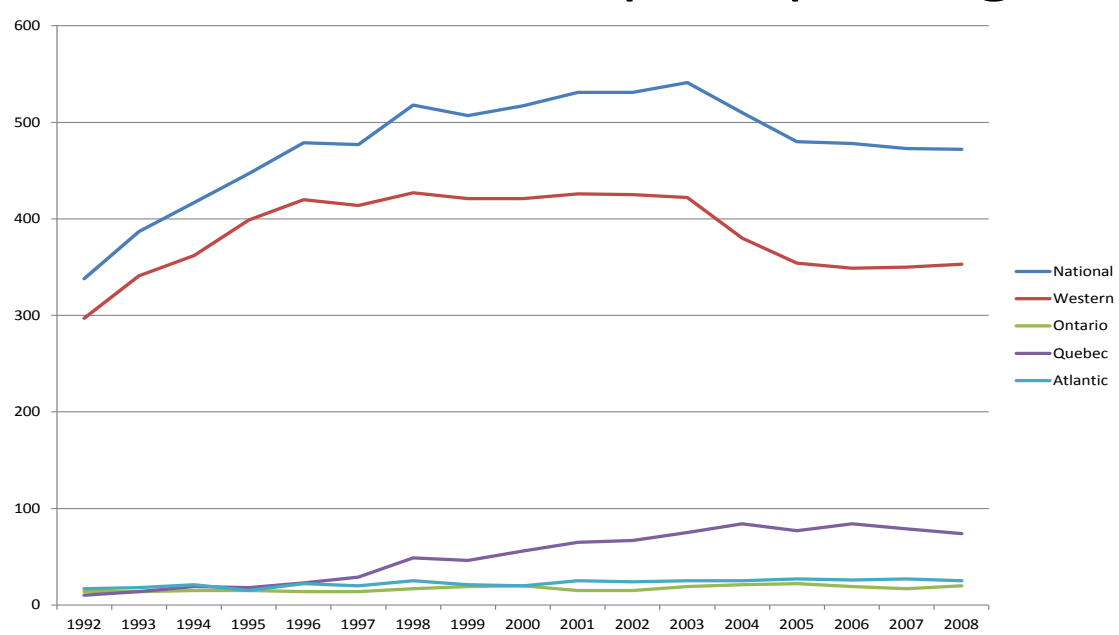
**Quebec:** Numbers show impressive growth from 1992-2003, (15-100), followed by a slight decline to 87 in 2004, but are up again to 95 in 08.

**Atlantic:** Numbers show growth, 26-44, with some slight slumps along the way. Numbers peak in 2006-07 with 46.

# Number of Incorporated Co-ops



# Number of Co-ops Reporting



## b) Volume of Business

**National:** Business shows continuous, but sporadic growth, with some slumps. It begins at 96 in 1992 and grows in ebbs and flows to 120 in 2008.

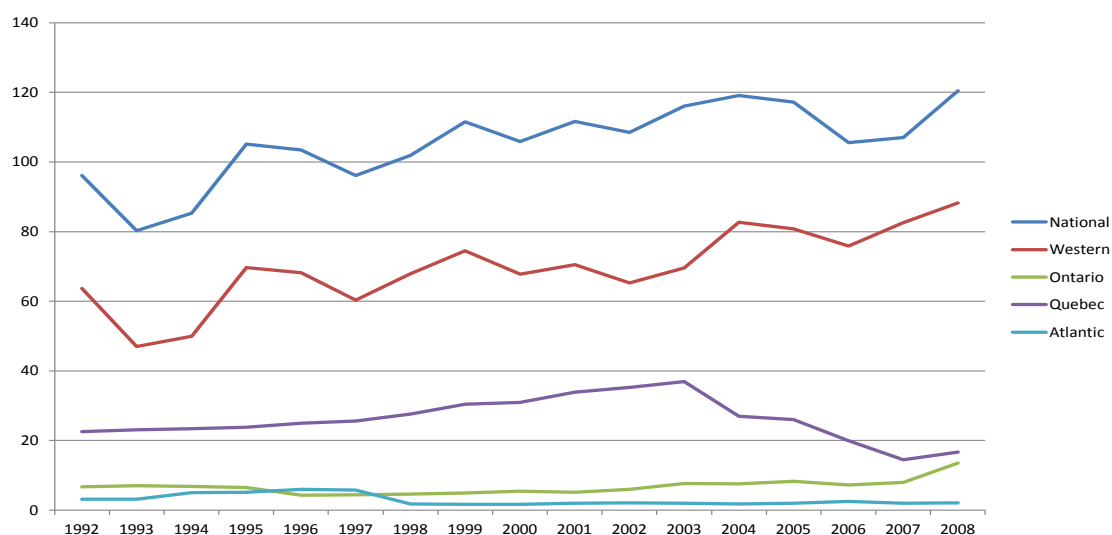
**Western:** Business shows growth, with some slumps, 64-88 in 1992 and 2008, both are the nadir and peak, respectively.

**Ontario:** Business numbers hold steady from 1992-94 (6.7-7-6.8), it then declines to 4.3 in 1995. After that is a period of growth, reaching 8.0 in 2007, followed by a sharp jump to 13.5 in 2008.

**Quebec:** Business shows growth, but not as impressive as numbers. From 1992-2003 it goes from 23-37, then declines to 17 by 2008.

**Atlantic:** Business shows growth from 1992-96 (3.2-6.0), but then trend down to 5.8 in 1997. It crashes to 1.8 in 1998, and hovers around there for rest of period, peaking at 2.5 in 2006.

## Volume of Business (in millions of dollars)



## c) Membership

**National:** Membership starts at 69 in 1992, then drops to 60 in 1993. It stays in low 60s until it hits 59 and 58 in 2004-05, followed by a sharp rise to 126-127 in 2006-08.

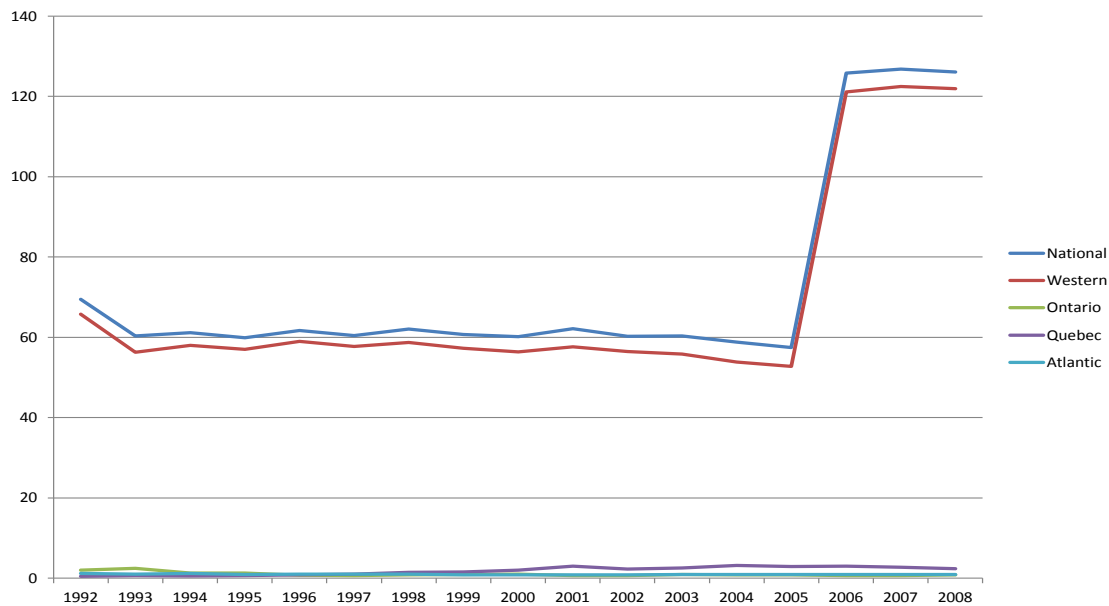
**Western:** Membership numbers show slump from 66-56 from 1992-93. It stays in high 50s from 1993-2003, but then goes down to 54-53 in 2004-05, with a sharp spike to 121-122, 2006-08.

**Ontario:** Membership numbers grow from 2.1-2.5 btw 1992-93, then decline to 1.3 in 1994. This decline keeps up until it hits 0.8 in 1998. The rest of the figures vary from 0.7-1.0, ending at 0.9 in 2008.

**Quebec:** Members numbers show impressive growth from 1992-2001 (0.5-3.0). It then declines to 2.3 in 2002, then rises to 3.2 in 2004; holding in the high 2's and low 3's, but declining to 2.4 in 2008.

**Atlantic:** Membership hovers btw 1.2-1.0 for 1992-98, and btw 0.8-1.0 for rest of period.

## Number of Members



### d) Employees

**National:** Employee numbers show sporadic ebb and flow, going from 966-1,283 in 1992-95, and hovering in the high 900s to low 1,100s from 1996-2003. It drops from 812-685 btw 2004-07, but then rise up to 777 in 2008.

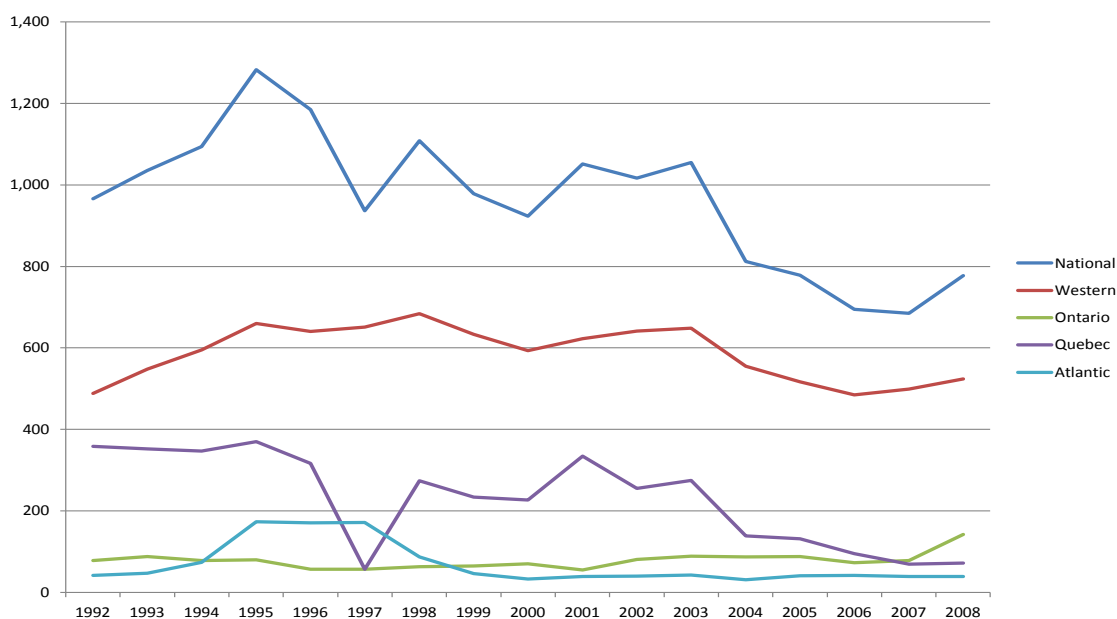
**Western:** Employee numbers are more sporadic, rising to 500s in 1993, it then ebbs and flows btw the high 500s and high 600s from 1993-2004, dropping down to low 500s and high 400s from 2005-08.

**Ontario:** Employee numbers are more sporadic, growing and shrinking from 1992-95 (78-88-78-80), then going down to 57 in 1996, and growing to 70 in 2000. It then goes down to 55 in 2001, followed by a sharp jump to 81 in 2002 then 89 in 2003. It then declines to 73 in 2006, but rise to 78 in 2007, and a sharp jump to 142 in 2008.

**Quebec:** Employee numbers show striking decline. While steady in high 300s from 1992-96, there's a sharp drop to 57 in 1997, but it jumps up to 274 in 1998, and holds in 200s and 300s from 1999-2003. It then goes down to 139 in 2004, declining further to 72 by 2008.

**Atlantic:** Employee numbers show strong growth from 1992-97, 42-172, but crash to 87 in 1998, and to 33 by 2000. They then rise up to 43 by 2003, but go down to 31 by 2004. They rise up to 42 by 2006, and are at 39 for 2007-08.

## Number of Employees



### e) Finances

**National:** Revenue shows growth from 1992-99, from 63.6 to 85 (service revenue is substantially greater). There is a sharp drop in 2000 (only service revenue keeps it in the black), and a long recovery to 2008 (which matches the figure for 1999). Same trend in Expenses. Assets, liabilities, equity, show continuous growth from 1992-2003, then begins to fall from 2004-08.

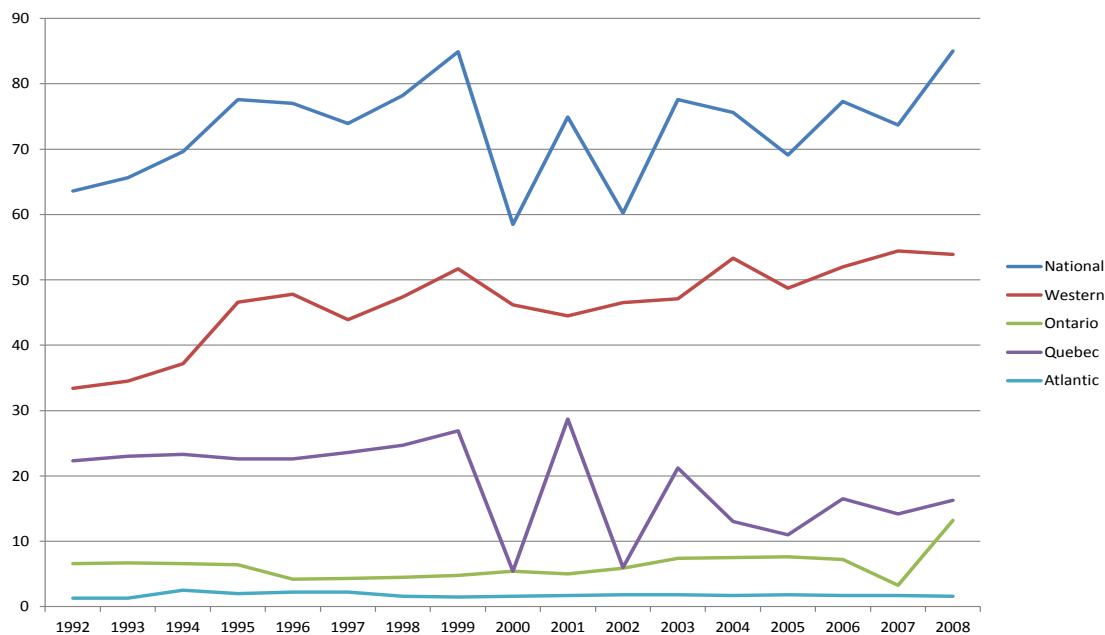
**Western:** Revenue shows growth from low 30s to high 40s/low 50s from 1992-99, and holds steady there until 2008. Expenses show more or less continuous growth from 35.9 in 1992 to 52.9 in 2008, with some slumps (peak is 53.9 in 2004). Assets, liabilities, and equity show rise in early 90s, slight decline then ebb and flow in that area for the rest of the period.

**Ontario:** Revenue holds steady in 6's in early 1990s, but decline to 4.2 in 1996. What follows is more or less constant growth, reaching 7.6 in 2005, followed by a slight decline in 2006-07, then jumping to 13.2 in 2008. Assets, liabilities, equity show growth from 1992-95, but decline from 1996-97. Growth resumes from 1998-2000, but slump in 2001, then hold steady in high 20s for rest of period.

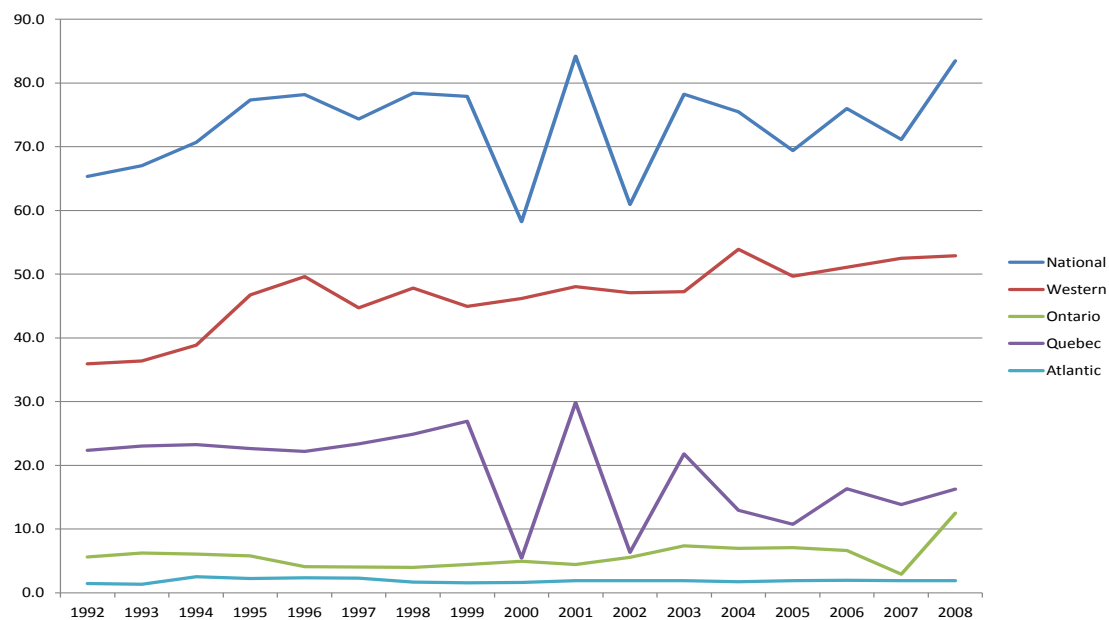
**Quebec:** Revenue grows throughout 90s, 22.3-26.9, followed by a sharp drop in 2000 to 5.3. It then goes back up to 28.7 in 2001, then down to 6.0 in 2002. Once again it goes up to 21.2 in 2003, and down to 13-16 for rest of period. The same trend is seen in expenses. Assets, liabilities, and equity show continuous growth throughout the period

**Atlantic:** Revenue grows from 1.3-2.2 from 1992-97, but drops down to 1.6 in 1998. It then hovers btw 1.6 and 1.8 for rest of period. Same trend is seen in Expenses. Assets, liabilities, and equity show growth from 1992-97, decline in 1998, and show slow growth for the rest of period.

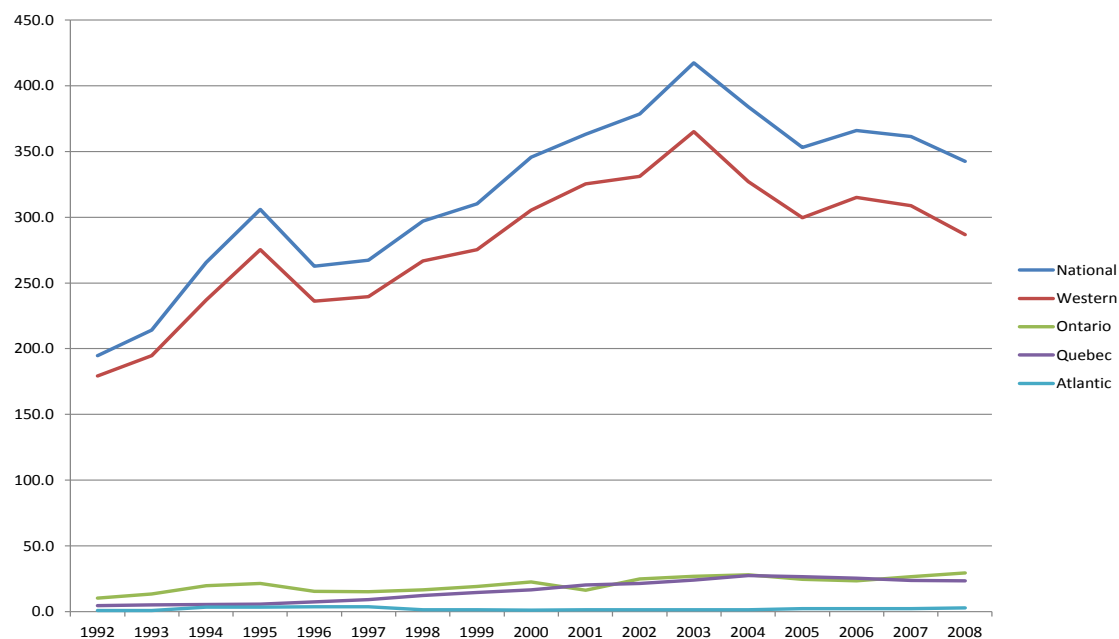
## Gross Revenue (in millions of dollars)



## Gross Expenses (in millions of dollars)



## Assets (in millions of dollars)



5) **Farm Supplies Co-ops:** Refers to manufacturing and or sale of farm supplies ex: feed mill, seeds, petroleum for farm use, fertilizers and pesticides (ex. Feed mill, Petroleum (farm), Other farm supplies).

#### a) Number of Co-ops

**National:** Numbers show gradual decline throughout the period, going from 280-238.

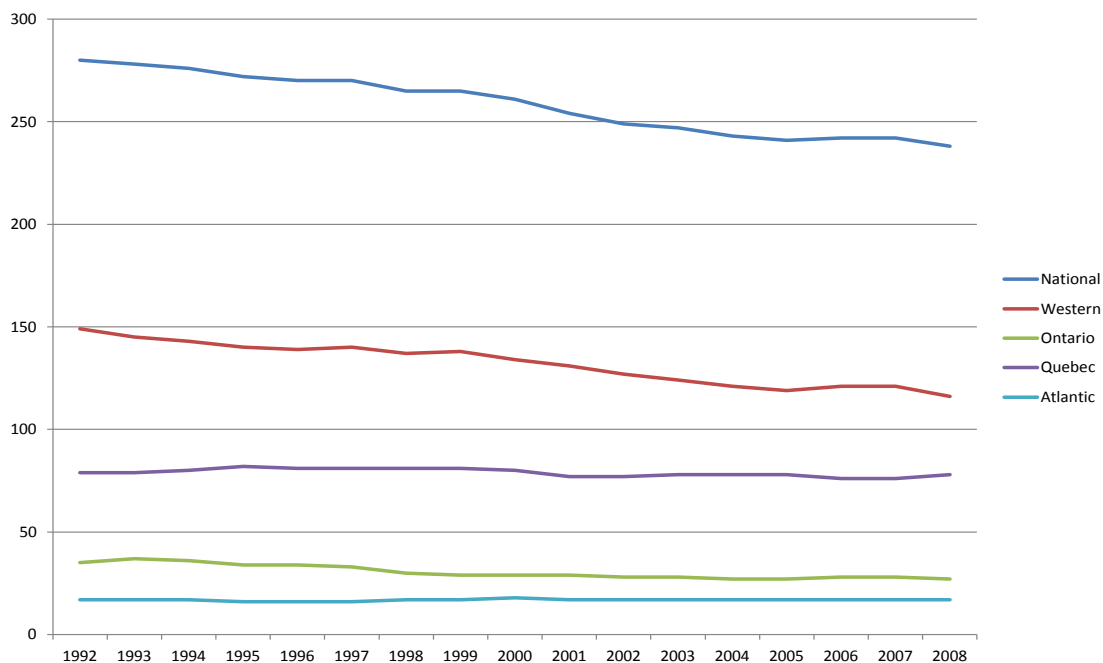
**Western:** Numbers show trend of slow decline, 149-116, though some years register a slight rise.

**Ontario:** Numbers show steady decline from 35-27, though some years show marginal growth.

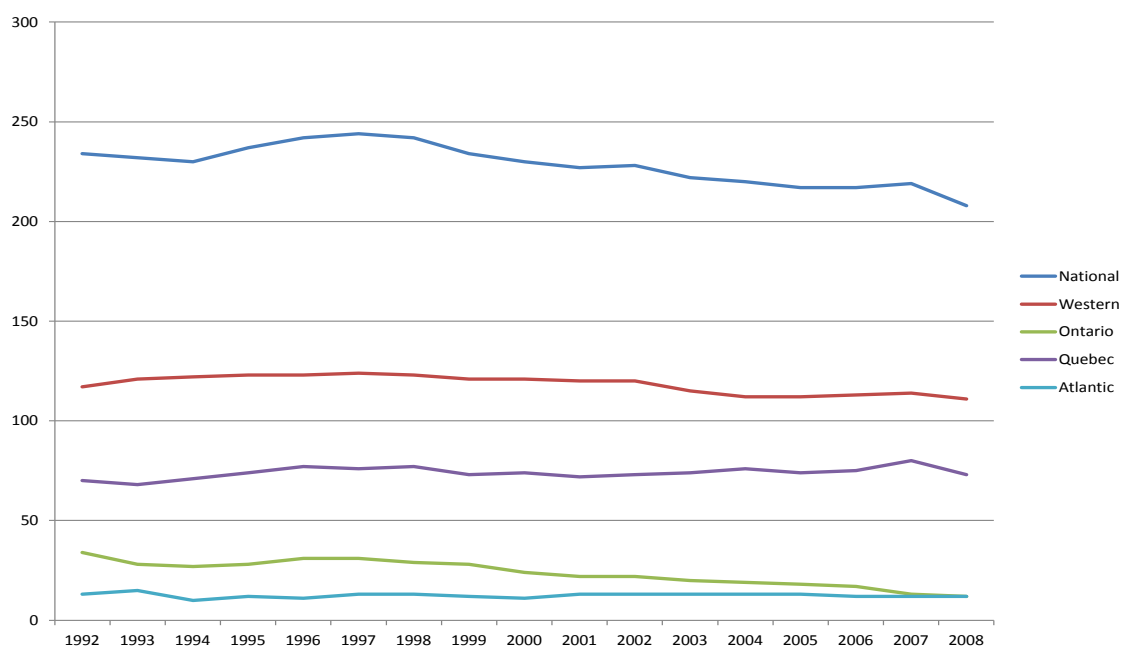
**Quebec:** Numbers are more or less consistent, 79-78 in 1992-2008, peak of 82 in 1995, low of 76 from 2006-07.

**Atlantic:** Numbers hold steady at 17 range, but dips to 16 in 1995-97, and up to 18 in 2000.

## Number of Incorporated Co-ops



## Number of Co-ops Reporting



### b) Volume of Business

**National:** Business numbers show continuous growth, going from 2,141-6,164.

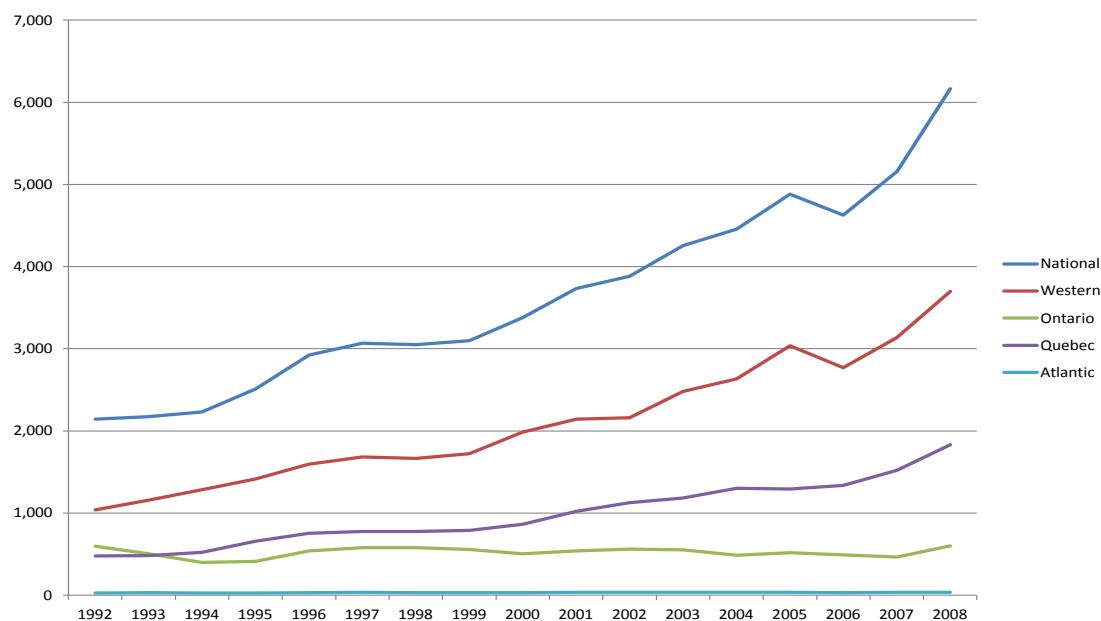
**Western:** Business numbers show continuous rise, 1,040-3,697, only slump years 98 and 06.

**Ontario:** Volume of business is more sporadic, declining from 9'2-94 (596-397), but rising from '95-97 (412-580). It holds in mid 500 range until 2004 when it drops to 488, then swings up to 515 in 2005. It then goes down to 466 in 2007, followed by a sharp rise to 601 in 2008.

**Quebec:** Business shows continuous growth, 479-1,831, only slump is in 2005.

**Atlantic:** Business shows overall growth, 27-35, but ebbs and flows throughout, peak of 37 in 2003.

## Volume of Business (in millions of dollars)



### c) Membership

**National:** Membership numbers show slight contraction from 1992-99, going from 299-283, but it then rises to 420 by 2008 (the peak year was 206-07, when it hit 424).

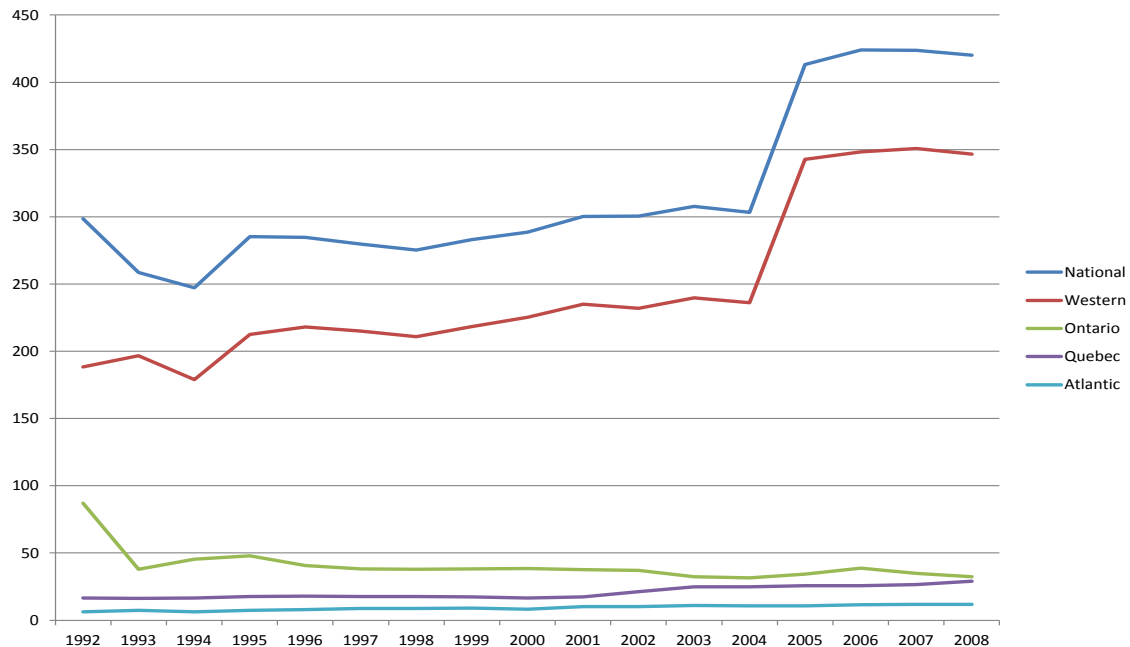
**Western:** Membership shows steady growth too, 188-347, only slight slumps in 94, 97-98, 02, 04.

**Ontario:** Membership numbers show steady decline, 87-32, with slight growth in some years.

**Quebec:** Members show steady growth, 17-29, only slump in 1993.

**Atlantic:** Membership numbers show steady growth, 6-12, some slumps in 1994-95 and 2000.

## Number of Members



### d) Employees

**National:** Employee numbers show almost continuous growth, 5,523-7,445, with a slight slump btw 2003-07.

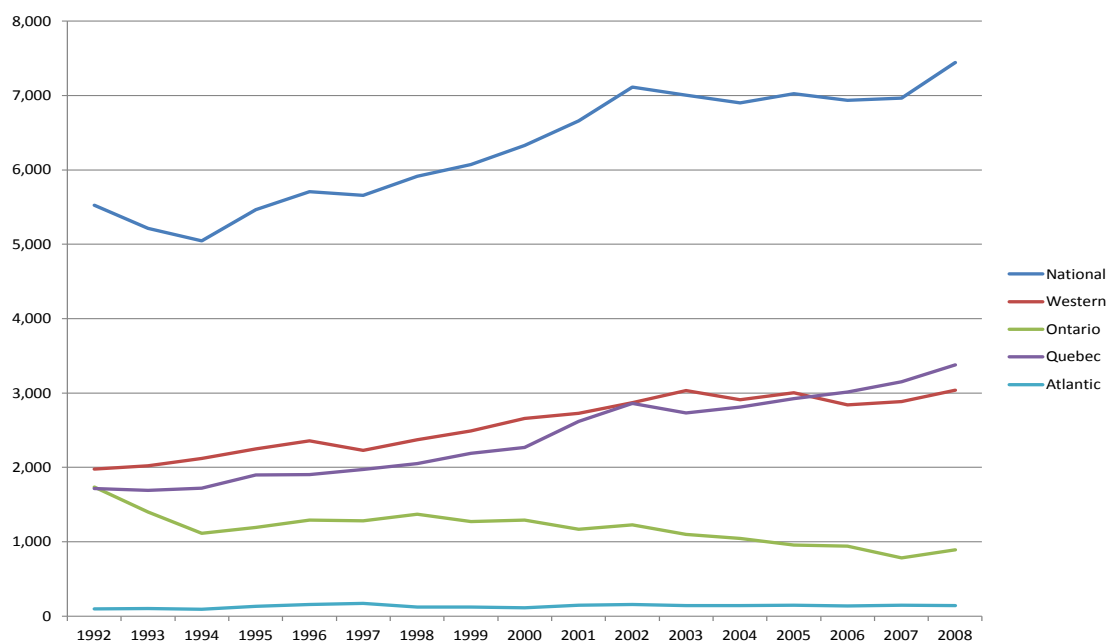
**Western:** Same trend in growth seen in employees, 1,978-3,038, with minor slumps in '97, '04, & '06-07.

**Ontario:** Employee numbers show same trend of decline, 1,735-889, but again some years show a rise.

**Quebec:** Employees show continuous growth, 1,713-3,377, but slumps in 1993 and 2003.

**Atlantic:** Employees show continued growth, 97-141. A peak of 173 in hit in 1997, then it goes down to 110 in 2000, and up again to 155 in 2002. It ebbs and flows in high 30s and low 40s for rest of the time.

## Number of Employees



### e) Finances

**National:** Revenue shows continuous growth, going from 368-759. The same trend is seen in expenses, but with some slight slumps. Assets, liabilities, and equity show continuous growth, but there is a slump in liabilities btw 1992-96.

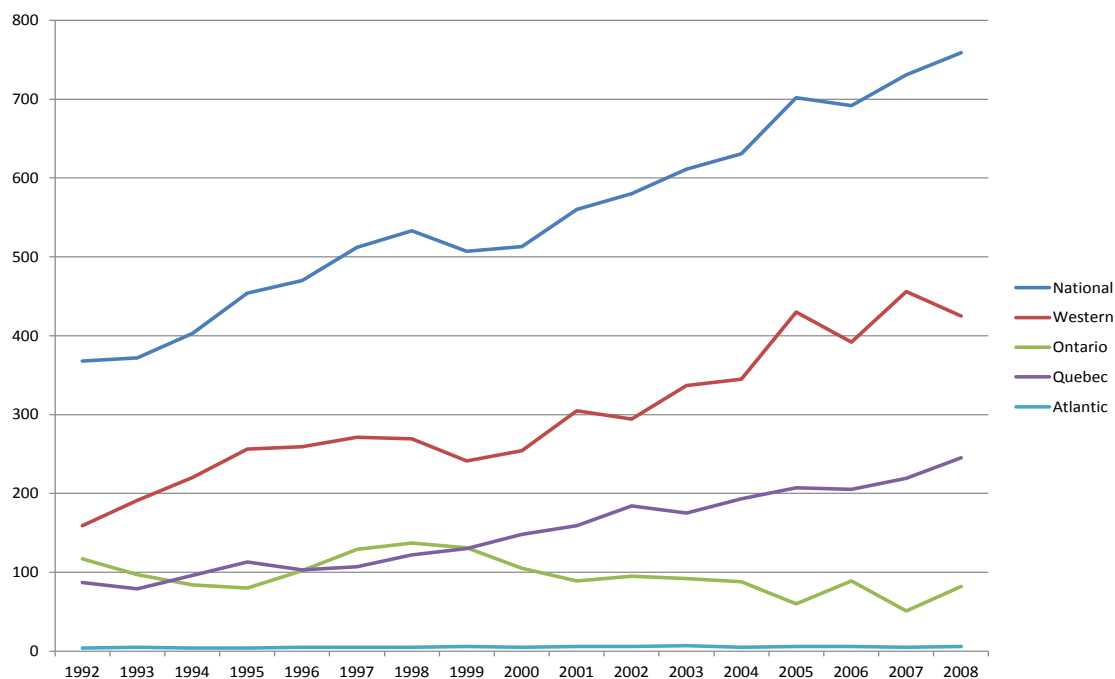
**Western:** Revenue likewise shows near continuous growth, 159-425, slumps in '99, '02, and '06. Same trend in expenses. Assets, liabilities, and equity show trends of continuous growth, but slight asset slumps in '98, '06.

**Ontario:** Revenue numbers are more sporadic, 117 in 1992, 82 in 2008, peak of 137 in 1998, low of 60 in 2005, constant ebb and flow in btw. Expenses show dramatic decline, 120-49 (lowest), peak of 133 in 1998, rise from 1993-95, 132-84, up to 133 in 1998, down to 95 in 2001, rise to 104 in 2002, then down to 49. Assets, liabilities and equity ebb and flow, but hold in high 100s to high 200s range. 92 peak for all.

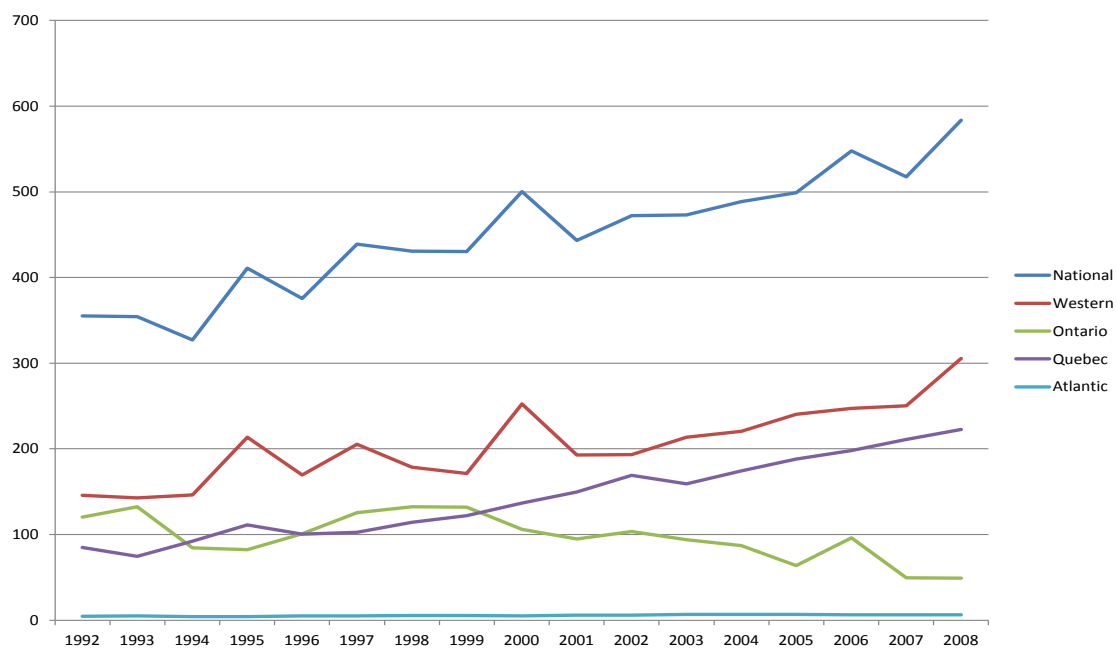
**Quebec:** Revenue shows near continuous growth, 87-245, slumps in 1993, 1996, and 2003. Expenses show same trend, 85-223, slumps in 1993, 1996 and 2003. Assets, liabilities, and equity show continuous growth, only slumping in 1993.

**Atlantic:** Revenue more or less holds steady at 4-6 (again ebb and flow), but some growth, peaking at 7 in 2003. Same trend in Expenses. Assets, liabilities, and equity show growth, peaking in early aughts and tapering off toward 08.

## Gross Revenue (in millions of dollars)



## Gross Expenses (in millions of dollars)



## Assets (in millions of dollars)

