



# STRATEGIC ROADMAP FOR PEI WILD BLUEBERRY GROWERS

Portfolio

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<https://peiwildblueberries.com/>

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## Overview

- **Purpose of the Roadmap:** This roadmap provides a comprehensive strategy for addressing challenges in the wild blueberry industry while ensuring long-term sustainability. It adheres to the PEIWBGA bylaws, only proposing necessary amendments to achieve shared goals.
- **Compliance with Bylaws:** The roadmap's objectives, including pricing stabilization, market expansion, and value-added development, align with the association's mandate to enhance returns for growers and promote the advancement of blueberry production.

## Executive Summary

The PEI wild blueberry industry is at a crossroads, grappling with price volatility, declining yields, pollination challenges, and a market dominated by two major buyers. This roadmap offers a clear plan to address these issues through multiple strategic approaches including processor relationship management, independent service development, climate resilience initiatives, and possible governance evolution.

**Key highlights include:**

- Developing independent crop management and support services to reduce processor dependency.
- Building PEI's brand as a global leader in wild blueberries with premium, eco-conscious positioning.
- Implementing comprehensive solutions for pollination challenges.
- Enhancing the association's structure through professional management and performance-based leadership.
- Creating climate resilience strategies to protect grower investments.
- Exploring various governance models including, but not limited to, a Maritime Wild Blueberry Alliance.

## Situational Analysis

### Internal Landscape:

- Wild blueberry farming in PEI spans 7,000 acres, with production declining to 19.6 million pounds in 2023, down from 32.1 million pounds in 2022.
- PEI growers face a 50% price drop from \$0.70/lb in 2022 to \$0.35/lb in 2023. This sharp decline has strained grower profitability and operational sustainability.
- Cross-provincial honeybee importation restrictions create significant pollination challenges for growers, impacting yields and operational costs.
- Climate impacts, particularly late spring frosts, are increasingly affecting production reliability and profitability.

### External Landscape:

- **Market Context:** PEI blueberries are part of a North American oligopoly dominated by two buyers, Oxford Frozen Foods and Wyman's, limiting grower autonomy.
- **Opportunities:**
  - Health-conscious consumers increasingly demand high-antioxidant products like wild blueberries.
  - PEI's brand, internationally recognized for purity, quality, and sustainability, provides a marketing advantage over other provinces.
  - Potential for developing value-added products and new market channels.
- **Threats:**
  - Rising competition from highbush blueberries in the frozen and processed markets.
  - Expansion of production capacity in New Brunswick risks marginalizing PEI growers further.
  - Limited access to pollination services threatens production capacity.
  - Increasing frequency of adverse weather events affecting crop yields.

## 4. Role of the Association

The PEIWBGA plays a central role in uniting growers, advocating for their interests, and providing the tools and resources necessary for success. Based on grower feedback and industry evolution, the following structure is proposed:

### 1. Professional Management:

- Transition to full-time executive director with performance-based compensation structure.
- Executive Director Performance Framework:
  - Industry Development (40%):
    - Achievement of price targets for growers (minimum \$1/lb)
    - Development of new market channels
    - Reduction in processor dependency metrics
    - Success in value-added initiatives
  - Operational Excellence (30%):
    - Member satisfaction ratings
    - Program implementation efficiency
    - Budget management
    - Service delivery metrics
  - Strategic Leadership (30%):
    - Progress on strategic initiatives
    - Stakeholder relationship management
    - Innovation and adaptation
    - Industry advocacy effectiveness
- Annual performance review incorporating quantitative metrics, stakeholder feedback, and strategic goal achievement.

### 2. Enhanced Service Delivery:

- Development of independent crop management services including spraying, scouting, and technical advisory.
- Implementation of equipment sharing programs.
- Coordination of pollination services and alternatives.
- Climate resilience support programs.

### 3. Governance Structure:

- Board oversight of strategic initiatives and performance metrics.
- Establishment of specialized committees for key focus areas.
- Regular review and adjustment of strategic priorities.

### 4. Member Engagement:

- Regular updates through newsletters, workshops, and annual meetings.
- Enhanced communication platforms and feedback mechanisms.
- Active participation in strategic planning and implementation.

## 5. Role of Government

The provincial and federal governments have a critical role in supporting the industry through funding, policy changes, and infrastructure development.

### **Key Government Actions:**

1. **Funding Support:**
  - Provide grants for processing facilities, branding campaigns, and international market development.
  - Support climate resilience infrastructure development.
  - Fund research into pollination alternatives and best practices.
2. **Policy Advocacy:**
  - Work toward resolution of cross-provincial honeybee movement restrictions.
  - Support development of collective bargaining frameworks.
  - Enhance crop insurance and risk management programs.
3. **Infrastructure Investment:**
  - Invest in regional processing facilities and innovation hubs.
  - Support development of pollination infrastructure.
  - Fund climate adaptation technologies and systems.
4. **Research and Development:**
  - Fund research into sustainable farming practices and product innovation.
  - Support studies on climate resilience strategies.
  - Investigate alternative pollination methods.

## 6. Strategic Approaches to Industry Organization

Multiple approaches to industry organization will be explored and evaluated:

1. **Maritime Wild Blueberry Alliance Option:**
  - Unified pricing strategy targeting \$1 per pound minimum.
  - Shared branding and marketing initiatives.
  - Collective bargaining with processors.
  - Joint infrastructure development.
2. **Enhanced Independent Association Model:**
  - Strengthened PEIWBGA with expanded services.
  - Focus on PEI-specific brand development.
  - Direct market access initiatives.
  - Value-added product development.
3. **Cooperative Development Approach:**
  - Producer-owned processing facilities.
  - Direct market access programs.
  - Shared equipment and services.
  - Collective marketing initiatives.

## 7. Strategic Action Items

### Action Timeline Responsibility

Action	Timeline	Responsibility
Implement mandatory levy system	0-6 months	PEIWBGA Board, member vote
Hire full-time executive director and implement ED performance metrics	0-6 months	PEIWBGA Board
Develop pollination strategy	0-6 months	PEIWBGA Technical committee
Develop joint branding strategy	3-6 months	Marketing Committee
Conduct feasibility study for processing	6-12 months	PEIWBGA, private processors
Evaluate governance options for association	6 – 12 months	Board and members
Advocate for \$1/lb pricing framework	3-6 months	PEIWBGA Board

## 8. Budget for Action Items

### Initiative Estimated Cost

<b>Initiative</b>	<b>Estimated Cost</b>
Transition to mandatory levies	Staff time
Expanded staffing (executive director, etc.)	\$90,000
Pollination program development	\$75,000
Branding and marketing campaigns	TBD
Processing infrastructure pilot	\$300,000
Governance evaluation	Staff time

## 9. Strategic Considerations

### Risks:

- Member resistance to organizational changes
- Processor pushback on independence initiatives
- Climate impacts on production
- Pollination service limitations

### Mitigation Strategies:

- Clear communication and demonstration of value
- Phased implementation of changes
- Development of multiple service providers
- Investment in climate resilience infrastructure

### Climate Resilience Framework:

- Frost Management:
  - Early warning systems
  - Protection infrastructure
  - Emergency response protocols
  - Insurance program enhancements
- Drought Mitigation:
  - Irrigation strategies
  - Soil management practices
  - Water conservation techniques
- Storm Protection:
  - Field protection measures
  - Recovery protocols
  - Risk management tools

## 10. Next Steps

1. **Immediate Actions** (0-3 months):
  - Implement Executive Director performance framework
  - Begin independent services development
  - Initiate pollination strategy development
  - Launch climate resilience planning
2. **Short-Term Priorities** (3-6 months):
  - Roll out initial services
  - Develop governance evaluation process
  - Implement frost protection measures
  - Enhance member communication systems
3. **Medium-Term Goals** (6-12 months):
  - Complete governance structure evaluation
  - Expand service offerings
  - Develop value-added initiatives
  - Implement comprehensive climate strategies

## Appendix A

### Options for Establishing the Maritime Wild Blueberry Commodity Board (MWBCB)

#### A. Legal and Regulatory Steps

- **Formulation of a Legal Entity:**
  - A Commodity Board operates under specific agricultural marketing laws, typically under the **Natural Products Marketing Act (NPMA)**, which governs commodity boards in Canada. The creation of the MWBCB would need to be based on this Act or its provincial equivalents in PEI, Nova Scotia, and New Brunswick.
  - The **PEI Natural Products Marketing Council** and its counterparts in New Brunswick and Nova Scotia would need to be consulted to facilitate the legal establishment of the board.
- **Plebiscite Approval:**
  - As per the **Natural Products Marketing Act**, a plebiscite (a producer vote) would be required to approve the formation of the MWBCB and the imposition of mandatory levies.
  - The plebiscite must be conducted with a majority of producers voting in favor of forming the board and implementing the levy system. This is a critical step and requires careful planning to ensure adequate producer support.
- **Bylaw Development:**
  - New bylaws would need to be developed for the MWBCB, including provisions related to **membership, governance, levy collection, and marketing authority**.
  - The bylaws would also need to reflect **accountability mechanisms** for the collection and use of levies, ensuring transparency in financial matters.

#### B. Governance and Structure

- **Board Composition:**
  - The MWBCB would be governed by elected representatives from across the three Maritime provinces (PEI, New Brunswick, Nova Scotia). These representatives would likely be growers or individuals with deep industry experience.
  - The board would need **at least one representative per province** to ensure equitable representation and regional concerns are addressed.
- **Operational Framework:**
  - **Executive Director:** The MWBCB would need a full-time, professional management team to oversee daily operations, including a **full-time executive director** to manage the transition and oversee operations such as levy collection, marketing strategy, and international negotiations.
  - **Subcommittees:** Depending on the scope of its operations, the MWBCB could form subcommittees focused on **marketing, policy advocacy, finance, and international trade** to ensure clear delegation of tasks.

## 2. Mandatory Levy Collection

### A. Setting the Levy

- **Rate Setting:**
  - The MWBCB would need to determine the appropriate rate for the mandatory levy. Typically, this is a **percentage of the sale price per pound of wild blueberries**, which is collected from all growers and paid by buyers (i.e., processors).
  - The rate should be **competitive yet sufficient** to fund the board's operational costs, marketing campaigns, and advocacy efforts.
- **Collection Mechanisms:**
  - The MWBCB would work with processors to collect levies at the point of sale. **Buyers** (Oxford Foods, Wyman's, etc.) would be legally obligated to deduct the levy from the price paid to growers.
  - Growers would need to be provided with **annual statements** showing levy amounts and how funds are being allocated by the board.

### B. Allocation and Transparency

- **Budget and Funding Priorities:**
  - The MWBCB would allocate levy funds towards core functions, including **marketing, market development, sustainability initiatives, and advocacy efforts** for fair pricing. Regular audits and transparent financial reports would be necessary to build trust and ensure effective use of funds.
- **Audits and Oversight:**
  - Regular financial audits should be conducted to ensure accountability and transparency, with results shared with growers and other stakeholders.

## 3. Taking Over the Marketing Function from WBANA

Currently, WBANA (Wild Blueberry Association of North America) manages the marketing and promotion of wild blueberries on behalf of producers across North America. The MWBCB would need to **assume these functions**, taking a more **regional** approach to marketing while ensuring alignment with global trends.

### A. Marketing and Promotion Strategy

- **Regional Branding and Promotion:**
  - The MWBCB would develop a comprehensive marketing plan, with a strong emphasis on differentiating **Maritime wild blueberries** as a **premium product**. PEI, with its strong brand reputation, could be the focal point of this campaign.
  - Marketing efforts would highlight:
    - **Sustainability:** Wild blueberries' ecological farming practices.
    - **Health Benefits:** Rich in antioxidants and nutrients.
    - **Local Production:** Highlighting the clean and pristine environment of the Maritimes.
- **Global Market Expansion:**

- As the MWBCB assumes marketing duties, it would need to **expand international efforts**, focusing on high-value markets in Europe, Asia, and other health-conscious regions.
- **Cooperative relationships** with international distributors and food retailers would be necessary to introduce the brand globally.
- **Consumer Education:**
  - A significant portion of the MWBCB's budget should be dedicated to consumer education, explaining the benefits of wild blueberries compared to cultivated varieties.

#### **B. Collaboration with Existing Marketing Channels**

- **Partnering with Industry Associations:**
  - Although the MWBCB would take over marketing functions, it should still collaborate with other industry groups, including **international marketing associations** and **regional grower groups**, to share market intelligence, reduce costs, and expand reach.
- **Integration with Local Retailers and Distributors:**
  - To penetrate local and international markets, the MWBCB should collaborate with **food retailers, supermarkets, and distribution networks** to ensure availability and consistent messaging.

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#### **4. Key Steps to Transition to a Maritime Wild Blueberry Commodity Board (MWBCB)**

1. **Legal and Regulatory Framework:**
  - Engage with provincial governments (PEI, NS, NB) to initiate the process for establishing the MWBCB.
  - **Plebiscite:** Organize a vote among growers to approve the creation of the MWBCB and the mandatory levy system.
2. **Form the Board and Set Governance Structures:**
  - Develop the board's governance structure, including selecting board members, hiring an executive director, and establishing operational roles.
  - Ensure a transparent **election process** for board members that involves growers from all three provinces.
3. **Implement the Mandatory Levy System:**
  - Set the levy rate and establish systems for collection by buyers at the point of sale.
  - Create a transparent process for reporting and allocating levy funds.
4. **Assume Marketing and Promotion:**
  - Develop a regional marketing strategy focused on the premium qualities of Maritime wild blueberries.
  - Allocate funding towards international market development and consumer education campaigns.
5. **Collaborate with New Brunswick and Nova Scotia Associations:**
  - Form a unified front for negotiations with processors and government bodies.
  - Develop shared advocacy and marketing campaigns to create economies of scale and increase impact.

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#### **5. Role of Government**

Governments at both the provincial and federal levels play a crucial role in the success of the MWBCB, particularly in supporting infrastructure, policy changes, and international market access.

- **Funding for Infrastructure:** Government grants would be needed to establish processing facilities and support value-added product development.
  - **Regulatory Support:** Advocate for regulations that support fair marketing practices, such as price-setting frameworks and international trade agreements that promote Canadian wild blueberries.
  - **Export Assistance:** Partner with the MWBCB to facilitate export opportunities, helping the board gain access to international markets through trade missions, funding, and regulatory assistance.
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## 6. Action Items for Maritime Collaboration

For a smooth transition to a Maritime Commodity Board, the following action items should be discussed and agreed upon with New Brunswick and Nova Scotia wild blueberry associations:

1. **Agreement on Levy Structure and Rate:**
    - Finalize the levy rate and agree on collection mechanisms.
  2. **Branding and Marketing Alignment:**
    - Develop a shared “**Maritime Wild Blueberries**” brand, while allowing provincial nuances (e.g., PEI’s eco-conscious messaging).
  3. **Governance Structure and Representation:**
    - Confirm the number of representatives from each province and ensure fair, democratic board elections.
  4. **Joint Advocacy Efforts:**
    - Develop unified strategies for lobbying provincial governments for funding, policy changes, and export market access.
  5. **Market Expansion Strategy:**
    - Jointly research and develop strategies for expanding into new international markets.
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This roadmap outlines the comprehensive steps needed to establish a **Maritime Wild Blueberry Commodity Board**, ensuring that the wild blueberry industry thrives through stronger regional collaboration, fairer pricing, and a robust marketing strategy that leverages PEI’s international brand strengths.

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## Creating a Maritime Wild Blueberry Commodity Board

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### 1. Overview of the Maritime Commodity Board Model

- **Objective:** Establish a unified organization across PEI, New Brunswick, and Nova Scotia to:
    1. Implement mandatory levies for consistent funding.
    2. Take over marketing and advocacy responsibilities, including those currently held by WBANA.
    3. Strengthen regional bargaining power and strategic direction in the wild blueberry industry.
  - **Rationale:**
    - Current voluntary funding models are inadequate for sustained marketing, advocacy, and infrastructure investment.
    - A Maritime-wide commodity board could ensure equitable grower participation and more impactful marketing efforts aligned with local interests.
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## 2. Key Benefits of a Maritime Commodity Board

1. **Unified Bargaining Power:**
    - Increased leverage in negotiations with major buyers by representing all Maritime growers under one body.
  2. **Stable and Consistent Funding:**
    - Mandatory levies provide predictable funding to invest in value-added projects, marketing, and international trade development.
  3. **Localized Marketing Strategies:**
    - Shift marketing efforts away from WBANA's broader North American approach to a Maritime-specific strategy that highlights regional strengths, such as PEI's premium eco-conscious brand, NB's production volume, and NS's processing infrastructure.
  4. **Greater Advocacy Capacity:**
    - A single entity could coordinate with governments to secure funding and policy changes for the entire region, increasing efficiency and impact.
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## 3. Structural and Operational Framework

### A. Legal and Organizational Structure:

- **Legal Formation:**
  - Establish the MWBCB under the Natural Products Marketing Acts of PEI, New Brunswick, and Nova Scotia, which govern commodity boards in these provinces.
  - Pass enabling regulations in all three provinces to create a tri-provincial commodity board.
- **Governance:**
  - Create a board of directors with representation proportional to production levels in each province (e.g., PEI, NB, NS).
  - Include grower representatives, government-appointed members, and marketing experts.
- **Membership:**
  - All wild blueberry growers within the Maritime provinces would automatically become members upon registration.

## B. Mandatory Levies:

- **Structure:**
  - A fixed levy per pound of blueberries sold (e.g., \$0.01–\$0.02 per pound) collected at the point of sale by buyers or processors.
  - Levies would be non-refundable and mandatory for all commercial growers.
- **Use of Funds:**
  - Marketing and promotion (40%).
  - Advocacy and administration (30%).
  - Research, innovation, and value-added projects (30%).

## C. Marketing Responsibilities:

- **Replacing WBANA:**
  - Assume WBANA’s role for Maritime-focused marketing while allowing WBANA to handle broader North American initiatives if growers support partial continuity.
  - Develop a Maritime brand emphasizing the unique qualities of wild blueberries from Atlantic Canada, including PEI’s purity, NB’s production scale, and NS’s processing strength.
- **Key Marketing Strategies:**
  - Launch an export-focused campaign targeting Europe, Asia, and niche North American markets.
  - Highlight the health benefits and premium attributes of Maritime wild blueberries.
  - Establish a robust digital and social media presence.

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## 4. Steps to Establish the MWBCB

### Step 1: Stakeholder Engagement (0-6 months)

- **Engage Growers:**
  - Host meetings in PEI, NB, and NS to educate growers on the benefits and structure of a Maritime board.
  - Address concerns about mandatory levies and the transition from WBANA.
- **Collaborate with Provincial Governments:**
  - Gain government support to pass the required regulations.
  - Secure initial funding for board setup costs.

### Step 2: Legal and Regulatory Setup (6-12 months)

- **Regulation Development:**
  - Draft enabling regulations for each province to allow for the creation of the MWBCB.
- **Approval Processes:**
  - Conduct plebiscites among growers in each province, as required by law, to ensure majority support.

### Step 3: Operational Development (12-18 months)

- **Form the Board:**
  - Elect representatives and appoint administrative staff.
- **Set Levy Rates:**

- Determine levy amounts and mechanisms for collection.
- **Develop Marketing Plans:**
  - Create Maritime-wide branding and promotional strategies.

**Step 4: Launch and Transition (18-24 months)**

- **Launch the Board:**
  - Begin levy collection and operations.
- **Transition Marketing Responsibilities:**
  - Take over WBANA’s marketing functions for the Maritimes.
- **Evaluate and Adjust:**
  - Conduct regular assessments to refine operations and strategies.

**5. Key Challenges and Mitigation Strategies**

1. **Grower Resistance to Mandatory Levies:**
  - **Challenge:** Growers accustomed to voluntary levies may resist mandatory contributions.
  - **Mitigation:** Conduct robust engagement campaigns to demonstrate the financial and strategic benefits of the board.
2. **Coordination Across Provinces:**
  - **Challenge:** Aligning regulations and priorities across three provincial governments.
  - **Mitigation:** Establish a tri-provincial task force to streamline coordination.
3. **Transitioning from WBANA:**
  - **Challenge:** Ensuring a smooth transition without disrupting current marketing activities.
  - **Mitigation:** Work with WBANA for phased transition and clear role delineation.

**6. Budget Considerations**

Item	Estimated Cost
Stakeholder engagement and education	\$100,000
Legal and regulatory setup	\$150,000
Initial marketing campaigns	\$250,000
Administrative staffing and setup	\$200,000
Research and value-added projects	\$300,000

**7. Key Roles**

- **Growers:**
  - Participate in plebiscites and consultations to shape the board’s priorities.
  - Continue focusing on production while the MWBCB handles marketing and advocacy.

- **Commodity Board:**
    - Set and collect levies, oversee marketing, and advocate for growers' interests.
    - Drive research, innovation, and value-added product development.
  - **Provincial Governments:**
    - Pass enabling regulations and provide initial funding.
    - Act as regulatory overseers to ensure compliance.
  - **Buyers and Processors:**
    - Facilitate levy collection and support value-added product integration.
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## 8. Next Steps

1. **Educate and Engage Growers:**
  - Develop materials explaining the benefits of a Maritime Commodity Board.
  - Host meetings across the three provinces to gather feedback and build consensus.
2. **Collaborate with Provincial Governments:**
  - Begin discussions with PEI, NB, and NS governments to outline the regulatory framework.
3. **Plan the Transition:**
  - Work with WBANA to define a phased transition of marketing responsibilities.
4. **Launch Plebiscites:**
  - Secure grower approval for the establishment of the MWBCB.

