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[Aller au sommaire du numéro](#)

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Résumé de l'article

In Canada, chicken, turkey, egg, and milk production is regulated through a supply management system. As a result, any Canadian farmer wishing to raise poultry or produce eggs or milk is legally required to hold a production quota. However, quota prices have risen sharply over time, creating considerable entry barriers for small farmers interested in selling supply-managed specialty products directly to consumers. The impact of the current system on small-scale farming and alternative food networks has led to growing calls for reform. In our study, we examine the debate around quota policies in the province of Quebec from a governance perspective. Our findings indicate that stakeholders disagree on the potential impact that supply management reforms would have on market stability, equity, farmer professionalism, and food safety. Fundamentally, these various points of contention highlight an underlying struggle for power and legitimacy between established stakeholders and beginning farmers, with both sides holding opposing views about the nature of farming, product quality, and sectoral management. The debate also underscores the challenges that supply-managed sectors face in trying to accommodate beginning farmers from diverse social and professional backgrounds.

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WHO GETS TO FARM? AGRICULTURAL RENEWAL, QUOTAS, AND THE GOVERNANCE OF ALTERNATIVE FOOD NETWORKS IN QUEBEC

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Abstract: In Canada, chicken, turkey, egg, and milk production is regulated through a supply management system. As a result, any Canadian farmer wishing to raise poultry or produce eggs or milk is legally required to hold a production quota. However, quota prices have risen sharply over time, creating considerable entry barriers for small farmers interested in selling supply-managed specialty products directly to consumers. The impact of the current system on small-scale farming and alternative food networks has led to growing calls for reform. In our study, we examine the debate around quota policies in the province of Quebec from a governance perspective. Our findings indicate that stakeholders disagree on the potential impact that supply management reforms would have on market stability, equity, farmer professionalism, and food safety. Fundamentally, these various points of contention highlight an underlying struggle for power and legitimacy between established stakeholders and beginning farmers, with both sides holding opposing views about the nature of farming, product quality, and sectoral management. The debate also underscores the challenges that supply-managed sectors face in trying to accommodate beginning farmers from diverse social and professional backgrounds.

Keywords: Supply management, quotas, governance, alternative food networks, beginning farmers

INTRODUCTION

In Canada, chicken, turkey, egg, and dairy products have been regulated since the 1970s through a supply management system based on the allocation of quotas. Under the rules in place, output is controlled so that production matches domestic demand, prices are fixed according to production costs to ensure that farmers earn a fair return on their investments, and imports of supply-managed goods are limited to protect Canadian producers and processors from competition (Painter, 2007; Katz et al, 2008; Goldfarb, 2009). The rules stipulate that any Canadian farmer who wishes to raise chickens, layers, turkeys, or dairy cows must obtain a quota once production exceeds a certain threshold.

In each of the four sectors under supply management, production is organized through shared agreements between the federal and provincial governments. At the federal level, the government allocates a quota to each Canadian province, based on market demand. The quota is then managed at the provincial level by a producer association legally responsible for distributing the province's allotment to individual farmers.¹ The national quota in each sector is periodically adjusted to reflect shifts in market demand, and the changes are passed down to the producer associations who then make adjustments to individual farm quotas. Consequently, if demand rises (falls), each producer's allotment is proportionally adjusted upwards (downwards). Producers can also buy and sell quotas through provincial market exchange platforms.

From a regulatory perspective, the producer associations in each province determine the maximum level of output that farmers can produce without a quota, as well as the minimum volume of production required to hold a quota.² All producers operating within a supply-managed sector, whether or not they own a quota, are legally bound by the regulatory decisions enacted by the sector's association. Given their legal mandate, the associations also have the power to enforce their decisions and penalize farmers found to be violating the rules. An independent food regulatory agency operates in each province whose role is to review the regulations adopted by the producer associations, ensure that the rules are correctly being enforced, and arbitrate any disagreements that arise between parties (Royer, 2008).

In recent years, however, Canada's supply management system has come under increasing pressure, spearheaded by growing demand among consumers for specialty foods, such as free-range eggs, organic chickens, and grass-fed milk (Young & Watkins, 2010; Mount, 2017). During the last two decades, alternative food networks (AFNs), such as farmers' markets, internet sales, and Community Supported Agriculture initiatives, have also become a larger part of the Canadian food landscape, even though such channels still only represent roughly 2.5% of total food demand (MAPAQ, 2019). Characterized by direct market relationships between local producers and consumers, AFNs have emerged as sites of resistance to the industrial food system. According to the latest agricultural census (Statistics Canada, 2016), 18.9% of farmers in the province of Quebec directly sold at least a portion of their output to consumers, generating annual median sales of \$20,000.³ Studies have shown that farmers involved in AFNs create more employment opportunities, contribute to the re-

talization of rural economies, and are more likely to practice organic agriculture (Kneafsey et al, 2013; Vitterso et al, 2019).

Against this backdrop, local food activists and organizations promoting sustainable farming increasingly worry that supply management's stringent rules threaten the viability of AFNs and the availability of specialty foods in local markets. According to these critics, established, quota-holding producers lack the ability or willingness to respond to growing consumer demand for artisanal products since their farming model centers around the large-scale production of standardized food items.

Alongside the emergence of AFNs, Canada's farm landscape is also evolving, fueled by the growing ranks of beginning farmers who hail from non-agricultural backgrounds. Historically, farms in Canada were mostly transferred within families from one generation to another (Lobley, 2010). In recent years, however, the growth of AFNs, along with rising consumer interest in specialty food products, has led many would-be producers to pursue alternative pathways into farming (Mundler & Laughrea, 2016; Laforge et al, 2018). Evidence for this can be found in the growing number of non-inherited farms, the rising percentage of female producers, and the increasing number of farmers with post-secondary degrees. While established producers tend to specialize in one area of production, many beginning farmers produce and process a range of farm products and are more likely to use AFNs to market their output.

Nevertheless, beginning farmers trying to enter supply-managed sectors face considerable challenges. Quotas are often not available, and, when they are, the price is usually too expensive for new producers, many of whom operate smaller farms. Moreover, in certain supply-managed sectors, a minimum output is required of producers who wish to hold a quota, effectively creating an entry barrier for small-scale farmers. Without a quota, farmers can produce up to a specified limit, which varies depending on the province and sector. Yet, many supply management critics argue that the authorized exemption levels are not high enough that beginning farmers could turn their non-quota production into viable business projects (Gerson, 2013; Amir, 2014; Folie-Boivin, 2015; Lamontagne, 2015). Quebec has notably some of the strictest quota exemption rules in place. Currently, producers in the province without allotments are limited to raising a maximum of 300 chickens, 25 turkeys, and/or 99 layers annually (Mundler et al, 2020). Under pressure, the egg producer association (in 2016) and the poultry producer association (in 2020) each created a program that loans quotas every year to a select group of direct-market farmers to raise up to 500 layers or 2,000 chickens. Both programs are similar to those that had already been established in Ontario and British Columbia for several years (Mundler et al, 2020).

Nevertheless, the continued inability of many beginning farmers to produce supply-managed goods in profitable amounts speaks to broader issues of rural development in Canada and the limits of the industrial food system. To help overcome these challenges, consumer and farm activists have called on policymakers to change the rules of supply management and to make the system more equitable, environmentally focused, and accommodating to new farmers (Mount, 2012; Campbell & MacRae, 2013).

¹ In Quebec, the producer associations legally responsible for organizing supply-managed sectors are: the *Éleveurs de volailles du Québec* (poultry: chickens and turkeys), the *Fédération des producteurs d'œufs du Québec* (eggs), and the *Producteurs de lait du Québec* (dairy).

² The producer associations in Quebec were delegated this authority under the Act Respecting the Marketing of Agricultural, Food, and Fish Products (RLRQ, chapter M-35.1).

³ All figures are expressed in Canadian dollars.

The debate over supply management's future also masks deeper disagreements about the way modern-day food systems should be governed. Historically, supply management in Canada was managed through policy dialogue between a limited number of stakeholders, namely the federal government and the provincial associations representing quota-holding producers. However, with the rise of AFNs and the growing interest in specialty products, Canadian policymakers are increasingly forced to contend with new stakeholders who hold different views and expectations about the role of agriculture. The viewpoints of these groups differ from those of free-market critics of supply management, who argue that the policy's administrative nature leads to a misallocation of resources (Hall Findlay, 2012; Cardwell et al, 2015; Desrochers et al, 2018). AFN promoters question not so much the existence of supply management as its governance structure, which, they argue, should be more open to changes in consumer demand and reflect the needs of a new generation of farmers (Mount, 2017; Laforge et al, 2018; Mundler et al, 2020).

In this article, we explore the underlying factors and assumptions that shape the current debate regarding the impact of supply management on AFNs in the Canadian province of Quebec. In the next section, we present our analytical framework and methodology. We examine the administration of supply management from a governance perspective, understood here to mean a policy that accounts for a variety of stakeholders, expectations, and viewpoints (Healey, 1998; Looibach, 2010). Specifically, we discuss the extent to which those involved in (or wishing to enter) supply-managed sectors disagree about the potential impact of regulatory reforms on (1) market stability, (2) equity, (3) farmer professionalism, and (4) food safety. Finally, in the last section, we explore how disagreements over quota policies are driven by an underlying struggle for power and legitimacy between stakeholders who hold opposing views on agriculture, product quality, and sectoral management. As we show, these disputes also highlight the challenges that supply-managed sectors face in trying to accommodate beginning farmers, many of whom now come from non-agricultural backgrounds.

ANALYTICAL FRAMEWORK AND METHODOLOGY

Evaluating the quota policy debate through a stakeholder framework

To examine the debate around supply management, we applied the stakeholder analytical approach developed by Mitchell et al (1997). The framework was initially created to identify the most relevant stakeholders associated with specific industries. By drawing on concepts developed by Weber, it can be used to categorize stakeholders based on (1) their level of power, (2) their degree of legitimacy, and (3) the perceived urgency of the objectives they pursue.

Here, the notion of power refers to stakeholders' ability to influence other groups or individuals. Such power can derive from legal (regulatory) prerogatives but can also be economic in nature, as not all stakeholders have access to the same financial resources. Legitimacy, for its part, is determined by the amount of recognition that stakeholders enjoy regardless of their level of power. The concept refers to such qualities as charisma, the ability to convince, or possessing a unique expertise that is recognized by others.

Finally, stakeholders can be categorized by the degree to which their goals or demands are perceived as urgent. The demands put

forward can be specific, such as, in the context of supply management, requesting an increase in the production exemption limit for producers who do not have quotas. Alternatively, stakeholders can pursue more broad-based objectives, for instance, defending certain principles in the name of promoting the public good.

As we will show, the policy debate over quotas is not solely driven by economic considerations (i.e., whether a loosening of restrictions would be financially advantageous for each party). While economic factors are certainly important, our analysis suggests that the views and positions of stakeholders are also shaped by values, institutional legacies, and beliefs about the role of farming. Furthermore, as will be discussed, the ongoing debate is not simply a dispute between those who are "for" and "against" the current quota system. While the debate seemingly pits reform advocacy groups pushing for the rules to be relaxed without preconditions against organizations seeking to maintain the status quo, this basic observation overlooks the numerous middle-ground solutions that have been proposed.

Material and methods

The findings presented in this article originate from a research project on non-quota production in Quebec and the rest of Canada conducted in 2016–2017. To provide a grounded understanding of the current debate on quota policies, we collected both qualitative and quantitative data. Firstly, 23 semi-structured interviews were carried out with all relevant stakeholders in Quebec, including representatives of farm unions (n=6), producer associations (n=6), farmers from activist organizations⁴ (n=7), and the provincial ministry of agriculture (MAPAQ) (n=2). We also interviewed food safety experts (n=2). The interviews were conducted between October 2016 and June 2017, and each participant was asked the same set of questions and to explain the views of their affiliated organization regarding:

- quota regulations and exemption limits (both historic and current) and any recent regulatory changes;
- the raising of quota exemption ceilings to increase product availability in AFNs;
- non-quota production and the emergence of AFNs generally;
- the pre-conditions (if any) that needed to be met before quota exemption limits could be increased.

An initial analysis of interview responses enabled us to identify several themes touched upon by all stakeholders, namely market stability, equity, profitability, professionalism, and food safety. In the following section, we analyze the extent to which interviewed stakeholders disagreed about the potential impact of quota policy reforms as it relates to each of these themes.

To supplement the information gathered from the interviews, we collected data on quota prices and newly attributed allotments in Quebec. We also reviewed the current programs implemented by Quebec's producer associations to support beginning farmers, including farmers interested in selling specialty products through AFNs. As part of our research project, we also administered an online survey to 1,311 producers in Quebec who directly market their output to consumers. Contacted producers were all listed in a database of direct-market farmers in the province compiled by university researchers, and, in total, we obtained 261 valid responses. We present the data from a section of the survey, as it helps shed light on the evolving nature of farming in Canada and the challenges this presents for supply-managed sectors.

⁴ The main advocacy groups pushing for supply management reforms are the *Union paysanne*, a non-accredited farm union and member of *Via Campesina*; the *coopérative La Mauve*, a cooperative of direct-market farmers; the *Coopérative pour l'agriculture de proximité écologique* (CAPE), a cooperative that supports organic and sustainable local agriculture; the *Association des marchés publics du Québec*, the organization representing farmers' markets in the province; and *Équiterre*, the association that launched community-supported agriculture in Quebec.

Market stability

The responses to our semi-structured interviews reveal that food stakeholders in Quebec disagree as to whether increasing the quota exemption limits would lead to market instability. The associations claim that raising the allowable limits will compromise the orderly marketing of supply-managed products and lead to market “cannibalization” and the breakdown of the entire system. From their perspective, supply management is a politically fragile arrangement that too often comes under criticism from different sides. As such, there was a perception among interviewed association representatives that changing the rules would constitute a backdoor attempt to undermine the system.

On the other hand, reform advocates argued that any growth in output following an increase in the exemption limits would be modest compared to the total volumes produced in Quebec under quota. Indeed, by extrapolating the results of our online survey administered to direct-market producers, we estimate that the increase in Quebec would represent at most 2.9% and 0.27% of total egg and chicken production, respectively. Moreover, in the other provinces that grant special permits to producers in AFNs (Ontario and British Columbia), the share of permit-authorized production represents between 0.08% and 0.56% of provincial production, depending on the product (Mundler et al, 2020). Critics made a point of stressing that their objective was not to dismantle supply management, but rather to lower the entry barriers for beginning farmers seeking to produce artisanal food products, which were deemed too high. In response to this perceived issue, consumer and farm activists in Quebec have undertaken various efforts to raise public awareness about the challenges faced by new producers, many of whom operate smaller farms, directly sell their products via AFNs, and feel excluded from supply-managed sectors (Legendre, 2015).⁵ These efforts culminated in a lawsuit filed with Quebec's independent regulatory agency (RMAAQ)⁶ by a non-accredited union representing small farmers (*Union paysanne*). In the suit, the union requested that the annual exemption limits be increased for layers (from 99 to 300), chickens (from 100 to 2,000), and turkeys (from 25 to 300) (RMAAQ, 2016). In its decision, the RMAAQ rejected the petition to increase the turkey and layer exemption limits but did agree to raise the growing ceiling for chickens from 100 to 300 birds (although this was significantly less than what *Union paysanne* had asked for).

Interviewed stakeholders also disagreed as to whether there was a lack of specialty products in the food industry generally and AFNs specifically. Reform advocates argued that supply-managed sectors were neglecting certain artisanal product lines, such as free-range eggs and slow-growing or antibiotic-free chickens and that the quota system discourages diversity in farming and promotes industrial monoculture. In response to these criticisms, the egg producer association in 2016 launched a new program that allows direct-market farmers to produce above the exemption limit (99 layers).⁷ Nevertheless, only five new farmers are admitted to the program each year, and participants cannot grow more than 500 layers. Furthermore, program participants do not own the quotas they receive. Rather, the quotas are loaned out to them, but remain the property of the asso-

ciation and cannot be transferred. Consequently, permit recipients under the program are not members of Quebec's egg producer association and, thus, are not allowed to vote on proposals or take part in decisions. At the same time, they cannot sell their output through non-direct marketing channels (i.e., those involving a middleman, such as restaurants and local grocery shops) and are required to follow various sanitary and biosecurity regulations. By implementing such rules, the producer association is able to control the development of artisanal egg production for AFNs.

From an economic perspective, interviewed association representatives questioned whether the push to increase non-quota production constitutes a genuine response to changing patterns of consumer demand or whether it originates on the supply side from farmers seeking to pursue their individual projects. They also argued that supply-managed sectors needed to focus on meeting consumer demand through conventional supply chains to avoid creating market instability and surpluses, both of which negatively affect producers. We reexamine this issue later as it highlights a fundamental disagreement among stakeholders as to whether certain types of farms (and farmers) are more legitimate than others.

Equity

All interviewed stakeholders expressed equity concerns, although they disagreed on what policy outcomes would be considered equitable. Producer association representatives, for instance, were worried that raising the exemption limits would give small farmers without allotments an unfair competitive advantage in AFNs over quota holders. In their view, a regulatory change in this direction would, thus, not be desirable from an equity standpoint. From their perspective, farmers wishing to produce artisanal foods for AFNs must first enter the quota system.

However, during interviews, critics of supply management argued that the producer associations' position on the matter overlooks several key issues. Some of them brought up the fact that their goal is not to specialize in the large-scale production of one or two products, but, rather, to offer consumers a variety of choices. Uninterested in a system designed for specialized producers, many interviewed critics simply wanted to see the exemption ceilings increased. However, even those willing to enter the quota system were quick to point out that quota prices have increased to such an extent that many beginning farmers do not have the financial means to purchase an allotment. When supply management was instituted in the 1970s, the initial quotas were freely allocated to producers in each sector. Since quota prices have increased over the last thirty years at a much higher rate than inflation, many of those original quota holders (or their descendants) have been able to realize significant capital gains. As Table 1 illustrates, the inflation-adjusted value of a chicken quota in Quebec in 2019 was 684% greater than in 1992. Likewise, in the egg sector, the value of a layer quota increased by 433% over the same period. To stem this increase, Quebec's egg producer association in 2015 capped the price at \$245. In the same year, the association also addressed the issue of capital gains by decreeing that newly issued layer quotas resulting from increases in market demand would no longer be tradeable and would remain the property of the association. Finally, the value of a dairy allotment reached a high of \$33,000 in 2006 before being capped and brought down to its current price of \$24,000.

⁵ Several prominent figures in Quebec have brought the issue into the public eye, including the farmer Dominic Lamontagne, who wrote a book called *La ferme impossible* (The Impossible Farm), which denounces the obstacles that prevent him from “running a farm with two cows, 200 hens, and 500 chickens” (Lamontagne, 2015). The artist and film maker Marc Seguin also focused extensively on non-quota production in his film, *La Ferme et son État* (The Farm and its State) (Seguin, 2017). A comic book on the subject titled *Faire campagne: Joies et désillusions du renouveau agricole au Québec* (Working the Countryside: The Joys and Disillusions of Agricultural Renewal in Quebec) was also published (Bourdillon & Cézard, 2016).

⁶ In French, the *Régie des marchés agricoles et alimentaires du Québec*.

⁷ As mentioned in the introduction, the poultry producer association introduced its own pilot program in 2020. As per the rules, up to 10 direct-market farmers per year are loaned an annual quota to produce a maximum of 2,000 chickens. Since the program was implemented after our interviews had taken place, it is not discussed here.

Table 1. Increases in per-unit quota prices in Quebec, 1992-2019

	Unit of chicken quota ^(a)	Unit of layer quota ^(a)	Unit of milk quota ^(a)
Quota price in 1992 (in current dollars)	\$145 ^(b)	\$28	\$12,800 ^(c)
Quota price in 1992 (in 2019 dollars)	\$236	\$46	\$20,798
Quota price in 2019	\$1,850	\$245	\$24,000
Potential capital gain ^(d)	\$1,614	\$199	\$3,202
Percentage price increase since 1992	684%	433%	15%

Source: Authors' calculations and Belzile (2003) (for the year 1992).

(a) Chicken, layer, and milk quotas are priced per square meter of production, per layer, and per kg of daily butterfat, respectively.

(b) All figures are expressed in Canadian dollars.

(c) The value of a milk quota was calculated using the average price between 1991 and 1996.

(d) A capital gain is only realized if a quota is sold. In the case of intergenerational transfers within families, the quota is usually sold at below market value.

Table 2. Growth and allocation of Quebec's chicken, layer, and milk quota from 2005-2015

	Chicken quota ^(a)	Layer quota ^(a)	Milk quota
Absolute increase in the provincial quota	21,250 million chickens	22,834,719 dozen eggs	14,686,760 kg of butterfat
Percentage increase in the provincial quota	14.1%	26.1%	13.5%
Allocation of new volumes to producers with prior allotments	93%	93.1%	82%
Allocation of new volumes to beginning farmers (via entry support programs)	7 %	6.9%	18%

Source: Authors' calculations based on data from Quebec's producer associations.

(a) We converted the chicken and layer quotas (which are measured in square meters of production and number of layers, respectively) into estimates of total output.

Due to high prices, most beginning farmers who enter supply-managed sectors do so by purchasing the family quota (usually at below market value) (MAPAQ, 2018). Often, the inherited quota is incrementally paid off by the new farmer, making it easier to spread out the financial costs of farm succession.

Reform advocates contended that supply management was not an equitable system because many quota holders obtained a part of their allotment for free when the policy was created. Intergenerational quota transfers were another point of contention, with critics arguing that it prevents those who do not have an agricultural background from becoming farmers. Statistics published by the MAPAQ (2018) indicate that, in 2016, 58% of inherited farms operated based on a quota. By contrast, only 15% of newly established farms owned one.

As was mentioned previously, one of the main objectives of supply management is to prevent market instability by ensuring that production continually adjusts to changes in demand. To this end, the quota in each supply-managed sector increases (decreases) in response to rises (drops) in market demand. The provincial associations are then tasked with deciding how these quota adjustments will be passed down to individual producers.

However, as critics pointed out during the interviews, new quotas are still primarily distributed to producers who already have an allotment, which raises issues of equity and fair access for beginning farmers. As Table 2 shows, from 2005 to 2015, rising demand led to increases in the provincial quotas (except in the turkey sector). The third and fourth rows indicate the share of new allotments distributed during the same period to already established quota holders and beginning farmers (via support programs) respectively. For many years, additional quota volumes were freely handed out by the associations to producers who already held allotments. Over time, though, the rules were modified to increase quota availability for beginning farmers. Nevertheless, as the table indicates, the percentage

of additional volumes going to new producers remains relatively modest, as most of the increase continues to be given to producers already in possession of a quota.

We note that quotas for beginning farmers made available through support programs are intended to facilitate the entry of would-be conventional producers into supply-managed sectors. As discussed previously, two small programs now exist (in the egg and chicken sectors) that specifically target farmers wishing to directly market specialty products to consumers. Overall, however, the figures in Table 2 highlight what critics regard as the insularity of supply management, which benefits established producers at the expense of beginning farmers, including those who wish to take advantage of the growing popularity of AFNs and specialty foods.

Profitability and farmer professionalism

Numerous disagreements were noted among interviewed stakeholders as to whether the small-scale production of artisanal foods marketed through AFNs represented a financially viable farming strategy. Producer association representatives argued that start-up costs would be too great and that beginning farmers needed to work within the current regulatory framework, which focuses on developing commercially sustainable farms. From the perspective of the dairy association, for instance, starting a small dairy farm would not be feasible, as such farms would be unable to supply milk to large industrial plants. Egg and poultry association representatives were also opposed to any increases in the quota exemption thresholds for their sectors, claiming that upstream stakeholders (equipment suppliers, feed companies, hatcheries) would be uninterested in servicing smaller farms.

Reform advocates took issue with these claims, arguing that farm profitability was not a sectoral issue and that individual farmers should be the ones to judge whether a project is financially feasible. In their view, a farm operation that might not make financial sense from an agribusiness perspective could very well be worthwhile in

Table 3. Characteristics of surveyed direct-market farmers compared to the provincial average

	Survey respondents (N = 261)	Quebec average ^(a)
Percentage of newly created farms	69%	35%
Percentage of female farmers	37%	27%
Percentage of university graduates	48%	14%
Percentage of respondents whose parents were farmers	42%	74%
Average farm size (in hectares)	56	113

(a) The data in the second column was sourced from Statistics Canada (2016) and the MAPAQ (2018).

the context of AFNs. Such a viewpoint runs counter to the stance taken by the associations, who are used to defining farm performance using conventional criteria. The associations worry that many beginning farmers interested in producing outside the quota system for AFNs are amateur farmers whose perceived lack of attention to food safety and biosecurity regulations could harm the image and reputation of supply-managed sectors. As such, doubts over the profitability of non-quota production seemingly mask deeper concerns about the professionalism of producers whom the associations regard as hobby farmers.

Professionalism in farming is a recurring theme in policy debates in Canada and other industrialized countries. After all, farming can be practiced either full- or part-time and may or may not represent a producer's primary source of income. As a result, in many countries, farm typologies have been developed to account for producers who do not practice agriculture in a professional capacity (which is the case when farming is not a significant source of household revenue). Statistics Canada (2011) categorizes such farms as "non-business-focused farms." In total, 51% of farms in Quebec were included in this category, which can be further divided into three sub-groups: "pension farms" (19.6%), "lifestyle farms" (15.6%), and "low-income farms" (15.9%).

In 2016, according to census results from Statistics Canada, 40% of Quebec farms registered gross annual revenues below \$50,000, and the share rises to 52% when farms in the \$50,000–\$100,000 income bracket are included. The large presence of small farms in Quebec indicates that many agricultural households in the province combine part-time farming with off-farm employment or other sources of income (e.g., pensions).

For supply management critics, the heterogeneity of Quebec's agricultural landscape is proof that farm profitability cannot be defined by specific performance benchmarks as not all producers expect to earn the same amount of income from farming. From the perspective of the producer associations, however, profitability is indeed a crucial consideration, and beginning farmers need to earn a living from farming through financially sound investments. Defenders of supply management even go so far as to contend that critics of the system have an outdated understanding of modern-day agriculture. As Marcel Groleau, the president of Quebec's only accredited farm union (*Union des producteurs agricoles*) argued in a press article, reform advocates "have a bucolic view of farming from half a century ago."⁸ Interviewed association representatives were also concerned that the perceived non-professional practices of so-called hobby farmers (who are not subject to the same regulations as quota holders) could harm the image of the agricultural profession if exemption limits were raised.

A key problem with this position is that it overlooks the potential contribution that non-quota production could play in protecting family farms. Indeed, by creating barriers of entry for certain types of would-be farmers, conventional understandings of farmer professionalism can become an impediment to rural and agricultural revitalization. It can also cause beginning farmers who participate in AFNs to feel "left out" as if their contribution to food production was nonexistent at best and problematic at worst. From a policy perspective, farm renewal is vital for maintaining the multifunctional services generated by agriculture and for preventing social isolation and economic decline in rural areas (Parent, 2011; Qualman et al, 2018). In Quebec, however, statistics from the agricultural census indicate that, between 2006 and 2016, the farm population declined by 5.6% (Statistics Canada, 2016).

At the same time, the agricultural profession has undergone profound changes due to the growing ranks of entrepreneurs with non-agricultural backgrounds who have chosen to become farmers. In Quebec, beginning farmers in this category rarely go into supply-managed production and tend to focus on AFNs and "emerging" (artisanal) product categories (MAPAQ, 2018). While some of them purchase pre-existing farms, many others start their own farms (MAPAQ, 2014 and 2018). This was confirmed by comparing the mean responses (see Table 3) from our survey administered to direct-market farmers with the averages for all producers in the province (81.1% of whom are conventional growers who do not use AFNs).

Compared to the provincial average, surveyed farmers (all of whom practiced direct marketing) were 4.2 times more likely to have started their farm, 3.9 times less likely to have parents who were farmers, and, on average, tended to operate smaller farms. Our results, which echo the findings of studies from other industrialized countries (Cazella, 2001; Barbieri & Mahoney, 2009; Wilbur, 2012) underscore the critical linkages between small-scale farming, AFNs, and agricultural renewal.

What our survey findings also show is that many beginning farmers view direct marketing as an attractive and viable business strategy. As the federation in Quebec responsible for supporting the next generation of farmers (FRAQ)⁹ argues, AFNs are a cost-effective option for small producers able and willing to take on post-production activities, such as processing and marketing (FRAQ, 2015). Beginning farmers are often able to carry out such tasks by utilizing skills and experiences acquired in previous professions. Indeed, as Table 3 shows, direct-market farmers often have higher levels of educational attainment and are more likely to hail from non-agricultural backgrounds. For critics of supply management, however, the vision of farmer professionalism pushed by the associations excludes such producers and has a detrimental effect on agricultural renewal and rural resilience.

⁸ As quoted in the Quebec daily *Le Devoir* (October 29, 2015).

⁹ In French, the *Fédération de la relève agricole du Québec*.

Food safety and biosecurity

Interviewed stakeholders agreed on the importance of food safety and disease prevention. Nevertheless, the producer associations viewed non-quota production as a potential source of outbreak that could damage the entire supply chain since farmers without allotments are not subject to regular sanitary inspections. To prevent such a scenario from occurring, association representatives argued that all producers needed to be governed by the same regulatory standards, regardless of whether they held a quota or produced within the exemption limit. Consumer confidence in supply-managed products could only be maintained, they argued, if the associations can keep their regulatory prerogatives and carry out enforcement and inspection activities as needed.

On the other hand, interviewed critics countered that current food safety and biosecurity measures were created with the industrial food system in mind and, thus, are not adapted to the realities of AFNs. The regulations, they argued, also endanger the survival of small family farming since the measures are more costly to implement, proportionally speaking, on smaller farms compared to larger ones.

Interestingly, interviewed farmers who produced specialty eggs and chickens claimed that their flocks were more naturally resistant to infections compared to commercially raised poultry. Immunity levels could be strengthened, they argued, by selecting different breeds and raising chickens under free-range conditions. Indeed, there was a dominant perception among interviewed direct-market producers that industrial farming negatively affects animal health, whereas the natural conditions on small farms allow for greater disease resistance in flocks. Similar arguments have been made by small-scale poultry farmers in other countries (Bavinck et al, 2009; Burns et al, 2013; Elkhoraibi et al, 2014).

The debate over biosecurity measures contrasts two opposing views about the role of modern-day agriculture and how to best protect consumers. As other researchers have noted, cultural factors often shape the sanitary norms that food systems adopt. This is evident, for instance, in the way different countries regulate the storage and handling of eggs. In Canada and the United States, the law mandates that eggs be washed and refrigerated, whereas, in Europe, washing is perceived as damaging to the quality of the egg and is prohibited (Hutchinson et al, 2003; Commission Regulation 589/2008). Other studies have highlighted the political nature of food safety regulations and the way power relations between stakeholders influence regulatory standards (Hatanaka & Busch, 2008; Hatt & Hatt, 2012; Laforge et al, 2017).

A great deal of research has been conducted on the health and sanitary conditions of so-called “backyard” flocks, as well as the possibility of cross-contamination between such flocks and industrial poultry farms (Bavinck et al, 2009; Pohjola et al, 2016). Nonetheless, there have been no studies to date that explore the potential risks associated with an increase in non-quota poultry production, which can be partly explained by the fact that Canada is the only industrialized country that regulates the sector through supply management. The current categorization of backyard flock owners also makes it difficult to explore such a scenario. The Canadian Food Inspection Agency defines this group as individuals who raise less than 1,000 birds¹⁰ for non-commercial purposes (Smith & Dunipace, 2011). Based on this definition, small poultry farmers in Quebec without quotas are grouped with backyard flock owners (in terms of bird numbers), even though they run commercial operations (since at least a portion of their poultry production is directly sold to consumers).

DISCUSSION: STAKEHOLDER POWER, LEGITIMACY, AND URGENCY

The debate over supply management is fueled by disagreements over the urgency and need for reforms and their potential impact on market stability, equity, professionalism, and food safety. It also points to an underlying struggle among food stakeholders for power and legitimacy in response to changing consumer tastes and the growth of AFNs. An analysis of the responses to our semi-structured interviews revealed five key areas of contention.

The first concerns the regulatory powers of the producer associations, which are increasingly contested by farm and consumer activists. Those who criticize the authority of the associations are generally supported by the public and viewed as having legitimate demands. Public support for food activists in Canada is in line with the results of studies conducted elsewhere, which found that consumers increasingly value AFNs and specialty foods (Zepeda & Li, 2006; Håkansson, 2015). While the legal authority of the producer associations continues to be upheld by Quebec's agricultural regulatory agency (RMAAQ), its legitimacy has been called into question as issues around supply management, small-scale farming, and AFNs are brought to the public's attention, either by individual campaigners (Lamontagne, 2015; Seguin, 2017) or through press articles and books (Folie-Boivin, 2015; Legendre, 2015; Bourdillon & Cézard, 2016).

Despite what might appear to be a unified front, supply management critics do not always agree on how to achieve their goals or on what kinds of compromises should be made when negotiating with the producer associations. Reform advocates who were interviewed also sometimes disagreed with each other as to whether the producer associations had a legitimate right to administer the quota system. For some, the producer associations could not legitimately remain in charge since they act as both judge and jury. According to their mandate, the associations not only enact regulations but also have enforcement powers and can sanction those deemed to be violating the rules. The consequences of this regulatory arrangement were candidly illustrated in a recently published book (Bourdillon & Cézard, 2016), which recounts the experiences of a producer who was prosecuted for growing more chickens than permitted under the exemption limit. The views expressed in the book were echoed by some of the producers we interviewed who reject any form of compromise with the associations and demand that the exemption ceilings be raised, regardless of what the associations might think of such a change.

On the other hand, certain farm activist organizations have taken steps to negotiate with the producer associations to find solutions that all parties can agree to. These stakeholder groups do not show a clear preference between a policy that would raise the exemption ceilings and one that would see the producer associations loan new quotas to producers in AFNs.

On the side of those who defend supply management, a clear-cut position was also not always adopted. For instance, within the *Union des producteurs agricoles* (the only accredited farm union in Quebec), certain regional chapters oppose any regulatory changes, while others have voted in favor of resolutions calling for the rules to be relaxed. The producer associations for their part have explored the possibility of making concessions that do not hinder the proper functioning of supply management.

A frequent criticism among reform activists concerned the exemption clause to Article 63 of the Act Respecting the Marketing of Agricultural, Food, and Fish Products, enacted by the Quebec le-

¹⁰ Here, “birds” refers to supply-managed poultry categories (chickens, turkeys, layers), as well as to other species (e.g., ducks, geese, quails, etc.) not subject to quota exemption limits.

gislature.¹¹ The article in question states that supply management regulations “[do] not apply to sales made directly by a producer to a consumer. Nevertheless, [regulators] may [...] on the conditions it determines, subject such sales to any provision of a plan, by-law, homologated agreement or arbitration award if it is of the opinion that such sales seriously affect their application.” Certain reform activists interviewed argued that the producer associations unfairly invoke the exemption clause to regulate direct-market farmers even when, in their view, there is no justification for doing so.

The second point of contention centered around the notion of the public good, with critics and defenders of supply management unable to agree as to what course of action would best serve societal interests. Interviewed association representatives argued that the current quota system, with its strict focus on market stability and quality standards, benefits both producers and consumers. The associations’ emphasis on collective decision-making (each producer has one vote at general meetings) derives from the nature of the quota system itself since all producers in a supply-managed sector without exception are subject to the same regulations. Consequently, each association takes a sectoral approach to food production, which critics argue jeopardizes the survival of small-scale family farming in Quebec (Folie-Boivin, 2015). Reform advocates, for their part, claimed that the public would be best served by increasing non-quota production as this would give Quebec consumers greater access to specialty foods and facilitate the growth of AFNs, which, they contend, generate a wide range of social and environmental benefits.

Thirdly, noticeable disagreements were noted among stakeholders as to what should drive market growth. According to producer association representatives, demand should be the only guiding factor when deciding whether to adjust production. Reforms advocates stressed that their criticisms of supply management were also motivated by demand considerations and that it was the associations who were ignoring changes in consumer taste. They pointed to the growing demand for specialty products in niche markets and the rise of AFNs as evidence that their goals were, in fact, legitimate. At the heart of this disagreement lies a difference of opinion as to whether markets operating outside of conventional supply channels should be considered legitimate. For the associations, producing outside the established quota system has little merit as it is not perceived to be a financially viable business strategy. Here, the legitimacy of markets is tied to conventional notions of farm profitability as defined by the standards of industrial agribusiness. However, as we discussed previously, farmers often have differing views about what constitutes satisfactory earnings, since agriculture is not always a full-time profession (Statistics Canada, 2011). The diversity of farms that make up Quebec’s agricultural landscape has led many reform advocates to argue that farmers and not the associations should be the ultimate arbiters as to what is produced and for what markets.

Fourthly, the debate over non-quota production is driven by two opposing views about the nature of innovation. In conventional supply chains, innovations are defined as new processes or technologies that increase the efficiency of production and distribution. Quality in this context refers to innovative solutions that improve product functionality, standardization, and safety (Mundler & Criner, 2016). The producer associations claim that supply management can respond effectively to changing consumer expectations around quality, as evidenced by the recent launching of a new line of omega 3 eggs. From their perspective, the quota system already promotes innovation and quality and ensures that consumers are satisfied with the health benefits, safety, and functionality of supply-managed products (Hobbs, 1998).

By contrast, in AFNs, innovation refers to the artisanal features of the food rather than technological changes or new production processes (Mundler & Criner, 2016). Producing specialty (artisanal) foods can be considered innovative as it requires producers to break away from standard industrial farming methods and offer something new to consumers. Whereas the conventional food system focuses heavily on product functionality and safety, in AFNs, the perceived quality of a product is tied to taste attributes and markers of authenticity. Innovation can also be driven by organizational changes, such as when farmers develop new ways of directly reaching consumers (Marsden et al, 2000; Kneafsey et al, 2013). Indeed, according to different studies, the relationships of trust that develop between producers and consumers in AFNs can be viewed as an innovative way of guaranteeing product quality in the absence of conventional food standards and certifications (Hendrickson & Heffernan, 2002; Trivette, 2017). As we showed, supply management critics in Quebec who share this localized, artisanal understanding of food quality contest the legitimacy of industrial food norms intended to reassure consumers in conventional markets, arguing that such measures were not meant or designed for AFNs and small farms.

Finally, we note that stakeholders disagreed about which forms of agriculture could be considered legitimate. As mentioned previously, many beginning producers in Quebec run smaller farms, and the associations fear that such farmers, whom they regard as non-professionals, are more likely to pursue unprofitable projects and adopt practices that jeopardize food safety. This apprehension can be partly explained by the associations’ strong views as to what constitutes legitimate farming (Holloway, 2000). From their perspective, farming is fundamentally an economic endeavor, meaning that producers must be able to earn a full living from it. Although the associations acknowledge that different forms of agriculture are practiced, they contest the legitimacy and demands of small producers, whom they often prefer to categorize as hobby farmers.

CONCLUSION

Supply management has become a governance issue in Quebec as the institutions in charge of administering the system come under pressure from consumer activists, small farmers, and organizations pushing for sustainable agriculture. The growing number of beginning producers (many of whom have non-agricultural backgrounds) who wish to directly market artisanal poultry, eggs, and dairy products has also fueled disagreements as to how supply-managed sectors should be organized. While the quota system has historically evolved through negotiations between the state and quota-holding producers (represented by their associations), there are growing doubts as to whether this arrangement remains sustainable. Moreover, the increasing popularity of AFNs coupled with new consumer interest in specialty products suggests the need for quota-regulated sectors to move beyond their current governance models (Ghosh & Fedorowicz, 2008).

From an economic perspective, the quota system was created to stabilize agricultural markets and protect farmer revenues by ensuring that supply matched domestic demand. While in recent years demand for supply-managed goods has grown considerably, the resulting increases in provincial allotments are usually distributed (proportionally) to producers who already hold a quota. As such, supply management continues to represent an entry barrier for many beginning farmers, especially for those interested in producing and directly marketing small quantities of specialty items.

However, the potential impact of reforms on market stability is only one aspect of this debate. As we showed, the growing number of new

¹¹ Chapter M-35.1, Act Respecting the Marketing of Agricultural, Food and Fish Products, Article 63 <http://legisquebec.gouv.qc.ca/en/ShowDoc/cs/M-35.1>. Accessed September 30, 2019.

entrants using AFNs has disrupted conventional understandings of what it means to be a farmer. While the producer associations continue to promote practices aligned with the industrial food system, alternative, more localized notions of agriculture have increasingly captured the public imagination and challenge many of the central tenets of supply management. Fundamentally, the disagreements explored in this article point to an underlying struggle for power and legitimacy among stakeholders who hold opposing views about farming, the nature of innovation, sectoral management, and product quality. The various points of contention also underscore the challenges that supply-managed sectors face in trying to accommodate beginning farmers from non-agricultural backgrounds whose values and expectations are not always aligned with those of established producers.

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