Elgin County Local Food Study

Prepared for:
Elgin Business
Resource Centre

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Executive Summary

The following study was contracted to the University of Guelph through the Elgin Business Resource Centre to explore the current state of the local food network within the Elgin County area. The intention of the study was to establish and provide relevant and current data on Local Food in Elgin County, to provide perceptions of local food and to aid in developing an effective local food strategy.

The study was completed at the request of of Donna Lunn (Elgin Business Resource Centre) and received her willing and able advice. Dr. Harry Cummings (University of Guelph) directed the research. The project team consisted of 6 graduate students: Project Coordinator: James Johnstone; Researchers: Murtaza Khan, David Lane, Therese Ludlow, Kailea MacGillivray and Andrea Vander Loo from the Rural Planning and Development Program at the University of Guelph.

The research focuses mainly on identifying the relationship between producers and institutional consumers. Producers consisted primarily of farms, but also included greenhouses, orchards, wineries and commercial bee hives. Institutional consumers were organizations that were in the trade of purchasing food that would be later sold or prepared for public consumption. Institutional consumers consisted of restaurants, bars, educational institutions, health institutions, child care operations and hotels. Producers and institutional consumers discussed in this paragraph are referred to as producers and consumers, respectively, throughout the remainder of this report.

A literature review was conducted to provide foundational facts on local food that presented not only a variety of information surrounding local food in Elgin County, but additionally, the province of Ontario and beyond.

A survey was conducted within the Elgin County area that consisted of a total of 64 stakeholders which sought data on a variety of subjects, including:

- perceptions on local food
- availability and demand for products
- linkages between producers and consumers
- challenges facing local food production and consumption
- opportunities for the future of local food

Seven key informants were also identified to help supplement survey data and give a deeper understanding of issues such as policy, legislation, supply and demand, networking and alternative opportunities.

Finally, a focus group consisting of 16 local food producers and consumers was held to discuss the most pressing challenges that they face in their effort to support local food.

The research identified a wide variety of perceptions and priorities among stakeholders. Local food itself is a term that has a multi-faceted meaning, associating itself with concepts of geography, community, health, environment and economic development. Stakeholders showed a general consensus that the local food market was emerging and that a potential for economic development existed. Consumer interest is growing as they are beginning more and more to associate local foods with the environment, health and economic development. However,

researchers were able to identify many barriers that could limit or at least slow the development of a local food system. The two most commonly identified challenges were associated with lack of supportive policy and the current inconsistency of local products to meet the demands of the consumers.

The survey results show that farms are producing large quantities of grain but that these products do not factor heavily in the local food network in Elgin County. Regulations on meat, dairy and eggs have created barriers in getting small scale meat/dairy products into local markets. Demand for meat by consumers is high, and a local market could exist if processing and quality assurance could be localised. Currently, the most developed local food relationships exist for fruits and vegetables. Many consumers and producers indicate that local products are being bought and sold locally primarily through wholesale and direct sale channels. There is, however, demand for many products year round and small local producers, in many cases, are ill-equipped to meet this consumer demand. Greenhouses are not available in sufficient numbers to meet the off season demand forcing consumers to seek products elsewhere, often opting for non-local producers that can provide product year round as they are hesitant to seek out numerous producers for a single product. Consumers identified lack of consistent availability, product cost and uncertainties regarding quality as their greatest barriers to buying local products.

To overcome such challenges in the long term; a cohesive, focused local food network may be an important starting place. The inability of local producers to challenge policy and to compete with larger food chains can be significantly aided by a strong coordinated effort on the part of local food stakeholders. Stronger relationships among local food stakeholders, including producers, processors, consumers, retailers and policy makers, will provide a local food movement with a series of advantages. A well established network provides better communication between producers and consumers, a stronger lobbying voice, a larger pool of resources and more recognition for the purposes of awareness and educational campaigns. A local strategy will continue to face threats imposed by provincial or federal legislation as well as from large non-local market practices. However, county level support has proven a valuable tool in moving local food strategies forward in other regions and can provide a strong foundation upon which to overcome some of the above mentioned challenges. Capitalizing on the growing interest in local food will also require extensive consumer education and awareness efforts. The more coherent and recognizable the message the more effective such campaigns will be.

The Elgin County Local Food Study has identified that there is a lot of support and interest for local food on the part of both producers and consumers. However, if the challenges associated with long food chains, restrictive policies and supply and demand are not recognized and addressed local food will remain a niche market restricted primarily to direct selling and limited wholesale. Building upon the emerging market, a comprehensive and cooperative network and strategy can grow in the region. Inclusion of stakeholders from a variety of sectors including economic development, agriculture, retail, health, education and environment will give a local food movement the kind of diversity it needs to overcome challenges. Strong communication and cooperation among stakeholders is an important foundation for the future of local food in Elgin County.

The following recommendations are made as part of this Local Food Study towards the goal of developing a strong local food system in Elgin County:

1. Networks need to be strengthened to help engage the local community more effectively.
2. Strong, local and coordinated policy is needed to develop local food systems in Elgin County, which allow food to be traced, local markets to thrive, and regulations that don't hinder the success of small operators.
3. Further research is needed to address the main concern of consumers which is lack of consistent availability of products. The viability of greenhouses to meet this demand is a potential long-term strategy worth investigating.
4. Institutional consumers are an excellent starting place for local food promotion efforts.
5. Household consumers need to be made aware of the wonderful food products local farmers grow each and every year. These products are fresh, and of high quality, and it is critical they be given space on grocery store shelves.
6. Intermediaries such as local food terminals and local food markets are essential to bring the field to the fork.

Table of Contents

1. Introduction

The study was completed at the request of Donna Lunn (Elgin Business Resource Centre) and received her willing and able advice. Dr. Harry Cummings (University of Guelph) directed the research. The project team consisted of 6 graduate students: Project Coordinator: James Johnstone; Researchers: Murtaza Khan, David Lane, Therese Ludlow, Kailea MacGillivray and Andrea Vanderloo from the Rural Planning and Development Program at the University of Guelph.

The Local Food Study for Elgin County offers a timely look at the systems surrounding food and agriculture in the region. The struggle in the local manufacturing sector, the shrinking demand for and production of tobacco and the growing interest in local food movements have produced ideal circumstances for this local food study and a region-wide local food strategy. As local food networks continue to develop and establish themselves, it is important to be aware of the strengths and weaknesses inherent in these initiatives as well as the opportunities and threats that they face. As such, the present study has consulted more than sixty producers and institutional consumers, hereafter referred to as producers and consumers, of local food in Elgin County in order to better understand the current situation and possibilities for the future.

2. Background

Elgin County, situated approximately 200 km southwest of Toronto, has a long history of agriculture, but with the decline of the manufacturing sector in Ontario, the importance of strengthening the agricultural sector has grown. Refer to Figure 1 for a map of Elgin County. In a study of the agricultural sector in Elgin County, conducted in 2000 by Harry Cummings and Associates, it was noted that “the manufacturing sector provides the greatest number of jobs in both Elgin County and across the province” (HCA, 2000, p. 6). However, a local food strategy report prepared by Donna Lunn (2010) has indicated that the once strong manufacturing sector has since taken a dramatic hit. The report notes a loss of 5551 jobs in a county of just 49,000 with another 36,000 people in the city of St. Thomas giving a modest total population in the region of approximately 85,000. The loss in manufacturing has had a huge impact on Elgin County and as such the jobs provided by the agricultural sector have become that much more important to the economic stability of the region. The manufacturing sector is not alone in its struggles for viability. As Lunn (2010) reports, the government has begun to step away from tobacco production, encouraging many farms to grow other crops. While all the described developments may threaten the economic wellbeing of the County, they also provide an opportunity for producers, retailers, policy makers, and consumers to re-evaluate the local economy. This opportunity could be harnessed to create a vibrant local food network creating a strong social, ethical and economic base.

Figure 1. Municipalities Elgin County (Elgin County, 2010b; St. Thomas –Elgin Tourist Association, 2010)

3. Literature Review

3.1. Definition of Local Food

The sometimes unclear understanding of what comprises a “local food system” comes from the non-descript nature of the term “local food” itself. As has already been stated, the term “local food” can take on as diverse an identity as the communities that surround it. The Elgin County website refers to the “100-mile diet”. The “100-mile diet” encourages restaurants and individuals to serve and consume “only fresh foods available within a 100 mile radius” (Elgin County, 2010b). This may serve as an important starting point when thinking about local food, however, different stakeholders at different parts of the value chain have a variety of ways and a variety reasons for defining local food in different ways.

To begin, we can consider the local food movement from three perspectives: those of environment, health and economics. Figure 2, below, has been adapted from a Scottish study on local food and captures the concept of local food quite effectively. The figure has been adapted however, where the Scottish study placed tourism; we have placed the more generic and encapsulating idea of economy.

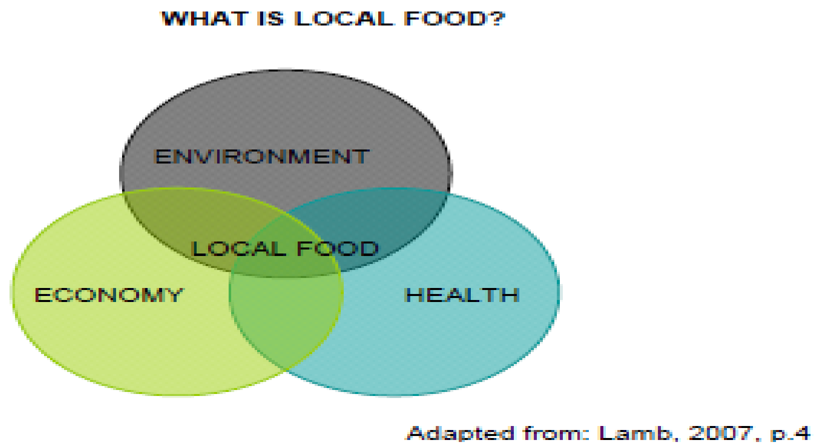

Figure 2. What is Local Food.?(Source: Lamb, 2007)

A broad definition of local food is often reasonably easy to agree upon. Simply put, one might state that local food consists of “food produced (and possibly consumed) in the local area of purchase” (Lamb, 2007, p. 7). Combined with the geographic boundaries and the concept of the “100-mile diet” we have begun to put somewhat of boundary on what we consider local. A less strict geographic definition defines local food as “consuming food as close to you as it grows (a more reflexive definition), e.g. grain from prairies, apples from Ontario, oranges from Florida, etc.” (Wormsbecker, 2007, p. 27). While this definition is still primarily geographic in nature, it has a very different sentiment in that it does not present the same geographic boundaries as those described earlier. The above definitions represent only a few of the many concepts that have driven local food movements. Some other considerations that recur regularly in the literature include: quality (how and what products are produced and sold), sustainability and viability (both environmental and economical) and concepts of community (connections, relationships, culture, etc.).

Indeed, the more limited geographical definition may not resonate deeply with consumers. In a survey of local food purchasers, Xuereb and Desjardins (2005) found that consumers were motivated by feelings that local food:

- Is fresher (88.6% of respondents)
- Preserves local farmland (58% of respondents)
- Supports local farmers (43.6% of respondents)
- Decreases dependency on imports (30.4% of respondents)
- Has travelled less (23.6% of respondents)
- Is cheaper (13.8% of respondents)
- Is safer (11.8% of respondents) (Xuereb and Desjardins, 2005, p. 12)

It appears that, at least from a consumer perspective, quality, environment and community are high on the list with regards to local food purchasing incentives. Diverse definitions of the above concepts add further complexity to the local food discussion. Many local food producers and consumers are very interested in “quality” as it has become an important attraction of local food. However, it again becomes difficult to determine what “quality” means. To some, it is equated with uniqueness, others freshness and still others in terms of value for money. Due to “a growing distrust in the quality of food stemming from conventional agriculture" (Renting et al. 2003, 395), a clear identity regarding the "quality" of local food is quite valuable. While it is likely impossible to develop a strict definition, some important considerations include: "consistency, freshness of produce, hygienic, economic and exciting packaging, quality raw materials and inputs, good consumer perception, correct production, handling, storage and processing techniques, food safety protocol, cool chain (avoidance of temperature abuse)" (Lamb, 2007, p. 17).

Perhaps equally problematic in the discussion of local food are the concepts of environmental and economic sustainability. The success of a local food system in these terms does not rest solely on how these terms are understood, but how the system itself is implemented. In terms of the economy, the literature suggests "that food security and sustainability are intrinsically linked through … local food supply chains" (Friedmann, 2006, p. 390). The implication here is that the environment and the local economy are both well served by "local food supply chains". In terms of economic development, there are suggestions that the conventional food distribution is flawed and that "rising fuel costs, climate change, threats to water supplies, or other economic disruptions… creates a new market window for a local food system to grow" (Xuereb and Desjardins, 2005, p. 22). While shortened supply chains and small farm production practices may have environmental and economic strengths, they do not stand alone outside of the social context of their region. Some argue that discussions of sustainability focus "too much on the environmental and economic components of agricultural production without paying due diligence to the social aspects of food issues within the movement" (Wormsbecker, 2007, p. 13). Such concerns call attention to another important factor in understanding local food: the community.

As noted above, "supporting local farmers" was high among consumer reasons for purchasing local food. Strong communities and direct relationships between farmers and consumers are other integral elements of local food systems. The importance of community cannot be understated. It has been said that "the important piece of local is in *knowing* or having a *relationship* with a producer/farmer" (Wormsbecker, 2007, p. 27). In a rural setting, it is important to consider that a local food system serves a community from within that same community. This community relationship provides the foundation for any local food movement. The sense of self-determinism and empowerment are community-related concepts that form part of the ethical framework of the local food movement. Communities recognise that "food security is attention to building *local capacity* to produce and distribute food and control food supplies . . . [and] to keep decision making power within the community rather than losing it through dependence on external sources of food" (Feagan, 2007, 28).

The literature suggests that on the surface local food movements involve a simple and desirable concept in which many communities ought to engage. However, when considered more carefully, a diverse set of dynamics become apparent that vary not only from region to region, but also based on the unique characteristics of stakeholders within a given region. A strictly defined concept of local food may not do justice to the complex nature of what truly makes a local food system successful. Understanding how producers, consumers, retailers and policy makers interpret ideas such as "local", "quality", "sustainability" and "viability" can be an important part of developing an effective local food system. Since "Local food research is place-based by its nature" (Landman, 2008, p. 2), it is important to consider these ideas in the context of the place in which they are being used.

3.2. Local Food Models

In their work for Waterloo Region Public Health, Xuereb and Desjardins (2005) divide local food systems into three internal and two external roles. They describe farming (producers), processing and distribution (intermediaries) and retail (sellers) as the primary roles to be filled in a local food system. Equally important are the external roles played by consumers and policy makers. Figure 3, below, displays some of these important stakeholders and their relative positions in a local food model.

This simple model expresses some of the numerous relationships that exist in a local food system. The demands of consumers and the decisions of policy makers add further dimension to an already multifaceted system. The cohesion and eventual success of a local food system relies heavily on the strength of connections between internal players and their successful communication with external stakeholders. Policy makers and consumers, while called "external", are integral to the local food system. They are external only in the sense that they are not actively engaged in the process of producing and selling product. Their influence on what and how products are sold cannot be underestimated.

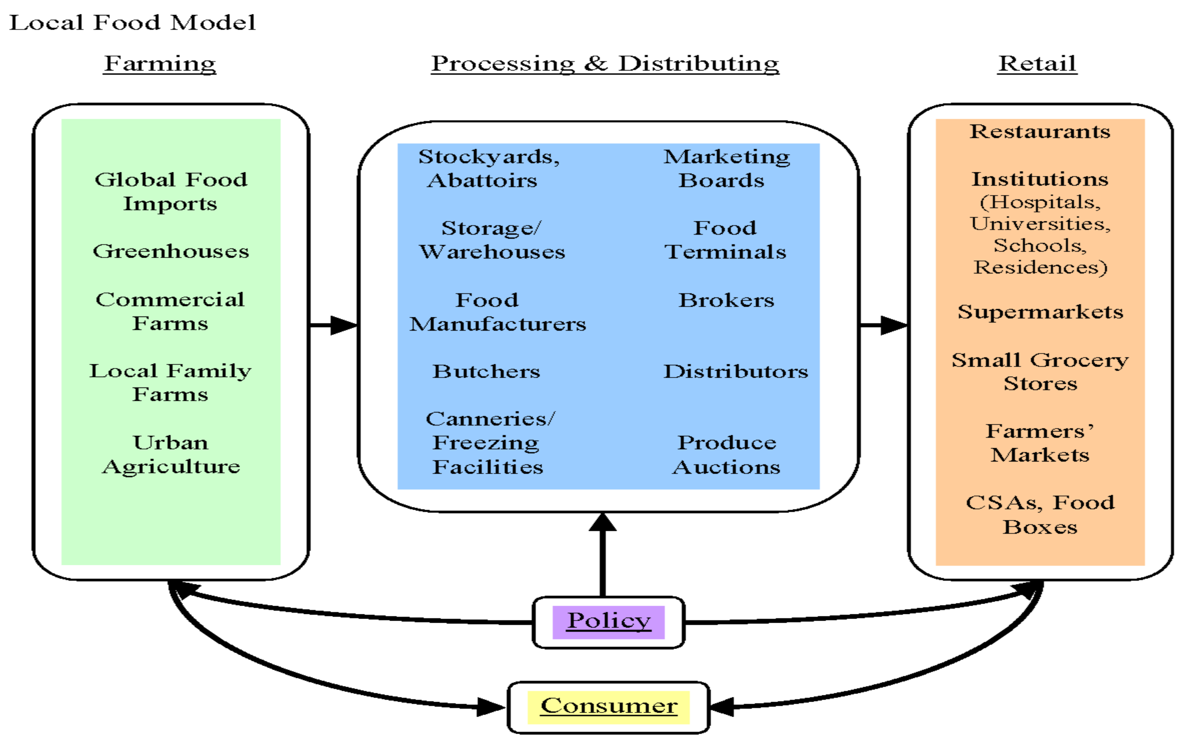

Figure 3. A Local Food Model. Adapted from Xuereb and Desjardins, 2005.

One of the keys to a successful local food model is a successful network. In a study of Guelph-Wellington County, Karen Landman et al. (2008, p.9) identified "improving the existing networks and communication among producers, retailers, consumers and policymakers" as one of three keys to developing a local food system. The importance of establishing networks is often emphasized in research surrounding local food as they provide: "support for members, sharing of expertise, group advice, and coordinated approaches to market, joint promotional activity, bargaining power and community support" (Lamb, 2007, p. 19). These networks provide the kind of single-mindedness and common purpose that can lead to the development of more formalized systems and structures to further support local food systems. “More formal networks can benefit from a co-operative structure, and can gain advice and benefits from shared ownership and greater control over activities” (Lamb, 2007). The strength of a network helps to engage community more effectively and provides a stronger voice to influence policy and legislation that affects farmland, food costs and agricultural practice.

Networks in different regions must take on a different focus based on their unique capacities and strengths. The particular environmental, economic and social circumstances in different locations make for different local food models. For example, in nations such as Italy, France, Germany and Spain, the number of farms engaged in short food supply chains are quite high “sometimes reaching shares of 15 - 35% of the total number of farms” (Renting et al., 2003, p. 406). Meanwhile, in the Netherlands and the United Kingdom these never reach more than 10% and “in Ireland never surpass 1%” (Renting et al., 2003, p. 406). Clearly, the networks in the first four nations have been developed strongly and have been attributed to the fact that they contribute “the highest socioeconomic impact” (Renting et al., 2003, p. 407) of all European nations.

Policy presents both restriction and opportunity in any food system. Over the last several decades, many policies have led to increased centralisation and the growth of large scale farming for export. From a local food stand point, when food policy is “driven solely by the goals of productivity and efficiency” it can have adverse “consequences that affect the community as a whole” (Xuereb and Desjardins, 2005, p. 18). The strength and validity of a strong network can be used to leverage positions that support local production and consumption and challenge market driven policies. A strong voice can be built on growing “perceptions (of) distrust in the quality of food stemming from conventional agriculture” (Renting et al. 2003, 395). In Canada, the “general consensus is that agricultural policy is not conducive to the development of a localized food system” (Wormsbecker, 2007, p. 45). Any local food model in Canada must consider policy change or policy mitigation if it is to be successful. A push for local food might be part of a more all encompassing policy push toward localization. Advocates argue that “localization should be about government provision of policy and an economic framework, which nurtures locally owned businesses that use local resources sustainably, employ local workers, and serve primarily local consumers” (Wormsbecker, 2007, p. 16). As such, policy makers exert authority over much needed infrastructure that is required for the forms of distribution demanded by the relationships of local food networks. The current direct selling model that dominates the early stages of local food systems development is limited and according to Landman et al (2008), in order “to move beyond this model, improved infrastructure for distribution must be created” (Landman, 2008, p. 12). The strengthening of local networks is a fundamental tool in this advocacy work. It provides invaluable “bargaining power” and “community support” with which to influence policy.

The numerous stakeholders included in a local food movement have different reasons for engagement. Even stakeholders that hold a similar profile (i.e. farmers who grow similar crops) do not necessarily share a common purpose. In the local Guelph-Wellington County food study, Landman et al. (2008) identified eight groups to be considered stakeholders in a local food system: farmers, institutional consumers, individual consumers, marketers (markets), outreach/promotion, transportation industry, seed companies and government institutions/research bodies (Landman et al., 2008, p. 8). The establishment of a coherent network may necessitate the development of a central body or a “convener”. This individual or group can help coordinate and focus a network with diverse needs and goals. The difficulty may arise in attempting to find “a convener that is legitimate in the eyes of most stakeholders”

(Landman, 2008, p. 13). A convener who does not represent adequately the different priorities of stakeholders may undermine the efforts of the rest of the movement.

Direct sales are the most basic and prevalent source of income in the early development of a local food network. In a 2005 study in the Region of Waterloo, it was found that those who are interested in increasing the local "content in their food basket" will need to seek "products from local growers who sell products direct from the farm and/or through local farmers' markets" (HCA, 2005, p. 79). Direct selling remains an important part of local food networks. However, without other marketing opportunities the development of a local food system is limited. Improved distribution and the availability of new local points of sale are possible avenues for improving accessibility of local food to retailers and consumers. Several local food networks have already begun "utilising the networks to operate in joint distribution structures or as a single point of contact for collaborative supply to the foodservice sector" (Lamb, 2007, p. 19). As has been addressed, however, in order for these networks to thrive they need to function within a policy structure that reinforces and enhances such initiatives. If local foods are to become more readily available to consumers, they need opportunities that expand beyond the direct selling market. Farmers' markets and on-farm sales deserve support, but improved access to consumers through institutions, retail stores and restaurants is also an integral part of the development of a robust local food system. Such opportunities are discussed below (See *Opportunities for Local Food*).

Key elements in local food promotion are marketing, education and awareness campaigns. Stakeholders in Wellington County identified networking and distribution as their highest priorities for a successful local food model. Marketing, education and awareness were also identified as necessary components (Landman et al., 2008, p. 10). These concepts are interconnected, but have distinctive characteristics. Marketing local food will take on a different face depending on how well recognised and understood the local food system is by consumers. A comprehensive marketing strategy "takes a longer term view and encourages you to focus on consumer needs when deciding what to produce, ensuring that your product satisfies consumer requirements and thereby ensuring repeat purchases" (Lamb, 2007, p. 28). Local food stakeholders engage in a variety of marketing strategies, including branding. Literature points to numerous ways in which branding initiatives can be effective. "Well-designed packaging, a label that gives (products) a brand identity, or third-party certification are all things that can add value to a product in the customers' eyes" (Nelson et al., 2007, p. 95). Branding can give local food a sense of geography and credibility as it creates a "cultural branding of food through its association with place" (Feagan, 2007, p. 26). Such branding is also used to present and promote quality in acknowledgement of the fact that "more consumers are associating the term local with a high quality fresh product" (Wormsbecker, 2007, p. 66). A strong and attractive brand can also serve to bring recognition to the "localness" of foods. Wormsbecker (2007) determined through case studies from across Canada, that there was interest in a "local label" in each case (Waterloo, ON, Lethbridge, AB and Nelson, BC).

"Most Canadian consumers are disconnected from their food source; they do not participate in growing it, or even know the people who did" (Wormsbecker, 2007, p. 41). As such, there is often a large gap in the understanding of local food and the potential it holds. Studies in Ontario have identified that education on the value of local food is an important step in the localization of a food system. In Wellington County and the City of Guelph, stakeholders agreed that "awareness and education programs on local food for the public" (Landman, et al., 2008, p. 15) were both valuable and necessary. Strategies regarding education include training sessions and could be integrated into the public school system. A Minnesota Farm-to-School program asserts that "integrating lessons in the classroom curriculum teaches children that their food choices matter to their health, to the environment, and to the people who grow their food" (Grisbo et al., 2007, p. 62). These educational activities reinforce more formal marketing tools and help to provide a better understanding of the value and purpose of a local food system. Wormsbecker (2007) asserts that education and awareness provide consumers with the fundamental understanding of healthy living that will consequently drive further interest in local food. Local food advocates can create general awareness of issues through non-profit promotion and agricultural events. Awareness campaigns can inform the public about the environmental, social and health concerns associated with much of the present system. An understanding of "food scares such as Avian Flu and BSE, as well as increased awareness of factory farming production methods" (Wormsbecker, 2007, p. 67) can have a drastic impact on the perceptions and behaviour of consumers. Awareness need not be limited to the consumer. It is necessary to consider policy makers and to find new ways to encourage legislation and policy that supports a local food system. "The awareness and engagement of local municipal staff as to the economic development potential of local food systems must also be elevated" (Landman et al., 2008, p. 12).

Education, awareness and marketing are interconnected and require a high degree of flexibility. Local communities must be thoroughly understood in order to tailor marketing, education and awareness appropriately. The identification of stakeholders and the strengths and weaknesses of the region will guide local food movements toward appropriate approaches. The strategies adopted must also address a number of challenges that threaten the success of a local food system.

3.3. <u>Opportunities for Local Food</u>

While the challenges may be formidable, interest in local food and its capacity for ethical and sustainable development are becoming more popular as people gain a greater understanding of the related issues. "Food is increasingly understood as a sector with great potential for regional economic development" (Friedmann, 2006, p. 389). The capacity of a local food system increases with growth in awareness and the ability to communicate effectively with consumers and policy makers. In 2000, farmers in Elgin County expressed concern of "the low level of public awareness and support for farming" (HCA, 2000, p. ii). The fall of the manufacturing sector presents an opportunity to regain this awareness and support. There may be opportunity to build upon the greater portion of employment now represented in the agricultural sector.

In the early development of a local food system, several opportunities warrant special attention: education and awareness, distribution and adoption of co-operative models, coordination and linking efforts, policy considerations and marketing. If we consider the model presented in Figure 2, the external stakeholders - community and policy makers - are mainly involved in this process through education and awareness raising, policy development and marketing. Addressing these opportunity areas may help create more favourable conditions for a local food system to grow. One strategy is the involvement of non-profit bodies in offering "marketing support to farmers who can't pay for marketing sustainable products" (Friedmann, 2006, 394). Non-profit organizations can engage actively in awareness campaigns, policy advocacy and can "enable relationships between small farmers and institutional buyers" (Friedmann, 2006, p. 395). Non-profits can access public funds that, if used effectively, will provide valuable support to small-scale farmers. As such, the use of local food advocates can contribute powerfully to community engagement and can develop support and disseminate the information needed to influence policy change.

Tourism presents an opportunity for economic development through direct selling and alternative sources of income. “By diversifying into farm tourism, farmers can mitigate farm income losses and continue to practice farming” (Fadeyibi & Oredegbe, 2009, p. 2). Alternative forms of tourism income can go beyond farm tours and U-picks. They can include “activities off the farm and accommodation on the farm” (Fadeyibi & Oredegbe, 2009, p. 2). Effective farm tourism practices require a significant amount of planning and consideration including development of infrastructure, marketing plans, supportive policy and regionally appropriate practices (Fadeyibi & Oredegbe, 2009). The Province of Manitoba has developed a strong agri-tourism policy that provides insights into an emerging farm tourism market. Their website (http://www.gov.mb.ca/agriculture/tourism/) provides a list of activities and sites involved in agri-tourism.

The internal players, as identified in Figure 2, are those primarily engaged in the processes of distribution and adoption of co-operative models and coordination and linking efforts. There are countless coordination and linking opportunities in the food system. While gaining favour among individual consumers may be a long-term goal many institutional consumers have already adopted local food purchasing models in several regions of Ontario. For example, Friedmann’s study of the Toronto local food movement shows how strong networks and organised movements can “enable relationships between small farmers and institutional buyers” (Friedmann, 2006, p. 395). These relationships, established and enabled by non-profit action, between local small farmers and large institutional consumers (particularly the University of Toronto) have strengthened the local food system that area. Contracts with educational institutions have become an important part of local food work in the United States as they hope “to promote local supply chains on the universal social justice aims of school lunch programs” (Friedmann, 2006, p. 390). Educational institutions have represented an important set of consumers for local farmers and so too can relationships be developed with health facilities. “Since hospitals and healthcare institutions are in the business of keeping people healthy, it only makes sense that they should contribute to eating habits that promote good health” (Nelson et al., 2007, p. 22). Hospitals, health centres and regional health boards can be important allies in a local food network. Institutional consumers are a key link in a local food network that can provide not only a valuable source of income, but can also further educational and awareness efforts. The establishment of local food contracts with public institutions in Elgin County may open new markets and opportunities for local farmers. For instance, post secondary institutions such as the University of Guelph, the University of Toronto and the University of Waterloo have well established local food movements and research activities on campus. Efforts to engage with the University of Western Ontario, located just over 30 km from St. Thomas, could lead to some valuable opportunities.

The importance of local food is increasingly recognised in the mainstream. As the public expresses its interest, this could provide the right moment for local food advocates to engage with policy makers and overcome any policies that may have been restrictive in the past. Education, awareness, organization and effective communication are all influential contributors to policy change. Creating connections between consumers and producers through a variety of avenues will ultimately allow for the increased availability of local food. New ways of reaching consumers that go beyond on-farm and direct sales are important if local food is to become economically viable.

3.4. Challenges for Local Food

While the time may be right for local food movements to take advantage of favourable conditions, there are still formidable challenges facing local food systems. Political, infrastructural, economic and social barriers and insufficient policy, education and organization are cited as contributors to the following concerns of local food advocates:

- oversupply of agricultural commodities
- a competitive farming community
- limited local farmers/land
- time-knowledge skills for direct marketing
- unstable pay
- a lack of certified markets
- falling farm incomes
- rising cost of land
- risk averse farmers (Wormsbecker, 2007, p. 56)

A common concern is that farmers simply cannot afford to engage in food production for local markets alone because in the current conditions this could put their livelihood at stake. Conventional farming and low cost foods, supported by policy, create market conditions that limit the capacity of local foods to become marketable on a large scale. As such, many farmers are not prepared to put their livelihoods at stake for a system that may not be able to support them.

As a re-emerging market, there are uncertainties that accompany local food initiatives. Such uncertainty can slow the general acceptance and understanding of local food systems since many feel "it is too early to judge their viability and efficiency in delivering goals of sustainable agriculture and rural development (Renting et al., 2003, p. 398). In fact, there are scholars who actively argue that there is no evidence to confirm that local food systems will bring about the promises that have been suggested. Born and Purcell "argue that local food systems are no more likely to be sustainable or just than (other) systems" (Born & Purcell, 2006, p.195). They suggest that we can get in a "local food trap" and it is important to be careful not to limit our vision and thinking to "the local" as it does not inherently carry sustainability and social justice and that context is a very important consideration. Contributing to the uncertainty is a lack of study and awareness of rural development as a whole. It is noted that "problems of data availability and consistency represent one of the key barriers currently involved in exploring new rural development practices" (Renting et al., 2003, p. 404). More time and study of the implementation of local food systems may be required before a coherent and sustainable system can be developed.

Certification and food standards regulations play an important role in making local foods available to a more general market. "Certification involves setting standards for each type of food produced, selecting and training inspectors who can implement the standards, and working with farmers and processors to ensure that they meet and maintain the standards" (Metcalf Foundation, 2008, p. 15). Some retailers are limited in their capacity to adopt local products due to a series of government and industry standards. Consequently, "all farmers are facing a proliferation of governmental, corporate, commodity sector, and third party norms and 'performance standards'" (Friedmann, 2006, p. 393). Without an appropriate strategy for certifying local and organic products it will continue to be difficult to introduce local products into the conventional food system. Local Food Plus, based in Toronto, are leaders in the development of an approach towards organic and local certification. They provide a recognizable brand (Metcalf Foundation, 2008) and a certification process "based on a continuous improvement model, with support for farmers to move in the right direction in place of penalties if they fail to meet specific rules" (Friedmann, 2006, p. 393). This "continuous improvement model" allows those who are currently unable to meet certain standards to gradually take supported steps toward meeting standards without the burden of drastic immediate changes which they may not be prepared to make.

Concerns, including many of those described above, and were identified by stakeholders in the Wellington County local food movement. They point to deficient communication and information-sharing networks, the shopping values of consumers, economic viability, insufficient quantity of local foods and poor logistics for distribution (Landman, 2008, p. 9) as the major challenges facing the local food system. Again, concerns involve the strength of the globalised food system and the difficulty for local food to compete in such an ingrained system. Consumer education is sometimes low and purchasing trends can be dictated by "busy lifestyles and interest in food convenience" (HCA, 2005, p. 24). On-farm sales and even farmers' markets, as staples of the local food movement, do not always lend themselves to the demands of the majority of consumers. In the Waterloo region "consumers spend 86% of their average weekly food expenditure" (HCA, 2005, p. 50) in supermarkets. While local foods are sometimes found in limited quantities in supermarkets they can be difficult for consumers to identify and often struggle to compete with lower cost, mass distributed products (HCA, 2005).

The challenges to local food are many, however, increased awareness of the environmental impact of the present food system and some mistrust in large scale farming production have created space for a local food system to develop.

4. Methodology

4.1. Research Methods

The Elgin County Local Food Study used a mixed methods research design towards achieving study objectives. Both qualitative and quantitative research methods were used where appropriate in order to fully understand the local food market in Elgin County. The research methods used as part of this Local Food Study were literature review, questionnaire surveys, key informant interviews and focus group. These methods specifically allow for an inductive strategy to understanding the local food economy.

As stated above, the study research methods were used in order to answer specific study research questions related to the local food economy in Elgin County. Study objectives were to understand the strengths and weaknesses of producers and consumer organizations in selling and buying local food, and to understand the opportunities and threats of strengthening the local food market in Elgin County. These study objectives were then used as a framework to develop the following research questions used as part of the questionnaire surveys:

1. What are the existing institutional motivations towards local food in Elgin County?
2. What are the demographic and financial characteristics of organizations involved in the local food economy?
3. What food products are purchased and sold in Elgin County?
4. What market channels exist in Elgin County for local food?
5. What associations exist in Elgin County that may support a strengthened local food economy?
6. What institutional challenges exist for producers and consumers of local food in Elgin County?
7. What government incentives exist that may support a strengthened local food economy?
8. What future trends will shape the development of a local food economy in Elgin County?

9. What role can local food terminals play in a strengthened local food economy in Elgin County?

4.1.1. Literature Review

An in depth literature review provided the contextual basis for the present study. First, the review provided background information on Elgin County, focusing particularly on the state of agriculture and the local economy. Attention was also paid to steps that have been taken in comparable regions in Ontario towards establishing successful local food systems. The multifaceted nature of the term 'local food' was addressed in parallel with a discussion of a variety of local food models developed in Ontario and elsewhere. Finally, the challenges and opportunities related to the development of local food systems in general and in Elgin County in particular were presented.

4.1.2. Focus Group

One focus group was conducted in St. Thomas on April 7, 2010 with approximately a dozen local food producers and consumers in order to gain a deeper understanding of the organizational strengths and weaknesses facing the local food industry.

4.1.3. Key Informant Interviews

Semi-structured, open-ended key informant interviews were conducted in order to gather more in depth understanding of the opportunities and threats affecting the local food industry. Interviewees included a greenhouse operator, land-use policy expert, wholesale industry representative, public health expert, meat industry representative, and a local market expert. Summaries of key informant interviews can be reviewed in the Results section: 5.2.

4.1.4. Questionnaire Survey

A sample of local food producers (31) and institutional food consumers (33) were consulted through the completion of questionnaire surveys. Separate surveys for producers and consumers were designed to gather information on current practices and perceptions related to local food in the County. Surveymonkey (www.surveymonkey.com) an online survey tool was used for survey design, and data collection.

Surveys were conducted in person, via telephone, online and by dropped off mail-in surveys. Surveyed producers included: operators of orchards, wineries, beehives and a variety of livestock, fruit, vegetable and grain producing farms. Consumers included: restaurants, hotels, bed and breakfasts, schools, hospitals, long term care homes and child care centres.

Copies of each questionnaire survey are appended in Appendix 4.

4.2. Survey Refusal Rate

The initial research approach was to contact potential respondents over the telephone in order to complete the survey. Potential producer and consumer respondents were selected using a purposeful sampling strategy. If calls were not completed or respondent were busy then two additional attempts were made to establish contact. If contact was unable to be established then respondent contact was listed as unsuccessful. After all potential respondents on sample frame were successfully or unsuccessfully contacted, the research approach was modified to include contacting via email and dropping off surveys directly at respondents business locations. It was found that the completion of surveys via email and dropping off surveys in person were successful strategies in addition to contact via telephone. All contact approaches allowed for as much information of as many respondents as possible to be incorporated into this study. Figure 4 shows successful interviews versus unsuccessful interviews for this study.

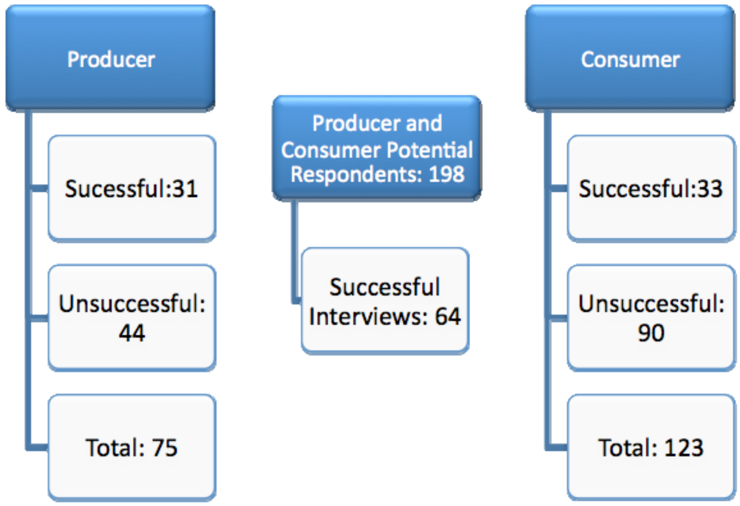

Figure 4. Survey Refusal Rate of Producers and Consumers

4.3. <u>Limitations</u>

It is important to mention some of the limitations of the study methods discussed above. First, there are a limited number of producers and institutional food consumers in Elgin County. Paired with an average survey response rate of only 32% (See *Survey Refusal Rate* above), the result was a statistically small number of respondents. Related to this issue is the fact that certain groups were less willing to participate in the study than others. For example, while secondary school cafeterias were often willing to discuss their perceptions of the food system, grocery stores were less likely to do the same. As a result, our study lacks the valuable perspectives of the less represented groups.

Secondly, the questions included in the survey were, in many cases, left to the interpretation of the respondent. While clarifications were possible through the telephone and in person interviews, those respondents who completed the survey online or by mail-in survey were left to interpret questions themselves and seldom contacted the surveyors for clarifications. Although every effort was made to ensure that the questions posed were clear and the format for answering was consistent, it is likely that individual respondents answered some questions differently from one another.
Finally, the study of local food systems is by nature, extremely complex. There is a great diversity of opinion and a large number of interrelated issues that contribute to our understandings. As such, we have needed to make certain judgments about which of these issues are most relevant with regards to the establishment of a local food system in Elgin County. Further study could be well directed towards areas not addressed specifically in the present study, such as: household opinion, food safety regulations, and geographical variation within the county.

5. Results

5.1. Focus Group

A focus group of local stakeholders was held in order to give voice to and identify the concerns and challenges of those with an interest in local food in Elgin County. In total, 16 participants engaged in an open, lively discussion of many issues related to local food. The discussion opened with the question “What is the biggest challenge to establishing local food?” Participants initially identified the need for new distribution channels and the importance for farmers to be able to engage actively in current food markets. It was suggested that in the past farmers could just farm, while today it was recognized that a business strategy might be integral to farm survival. Education about business management and marketing is seen as an important tool for farmers. The local farm market is a new emerging market that bears particular attention in the modern economy.

An important concern is the difficulty of consumer’s access to local foods. Some of the difficulties identified by participants included lack of knowledge complacency and “laziness” on the part of the consumer who seek convenience. Some producers expressed the inability to provide products (specifically meat) as quick and conveniently as consumers desire them, with one participant suggesting that “people are lazy”. It was important to several participants that the public be educated about local foods. Many consumers are unaware of where products are coming from and restaurants are said to simply drop farm fresh products if a producer cannot provide them with the right price. A noted concern was that products are “repacked”. Non-local products in supermarkets are being sold in local boxes or under the same umbrella as local products making it even more difficult for consumers to identify which products are local. It was noted that in Toronto there is quite careful evaluation of whether or not a product that is sold is truly local, there are individuals responsible for overseeing and ensuring “localness”.

One potential awareness and distribution opportunity identified by a participant was a “virtual food terminal”. This is an online site where consumers and producers can interact and can arrange business relationships and sales.

Participants acknowledged a need to lobby government for policy that will support local food. It was noted that the Region of Waterloo has already begun to incorporate local food into food policy practices. Certification requirements pose a distinct challenge for local food producers. Sale of canned products is an option to overcome seasonal tendencies of products. However, regulations on quality and costs associated with processing once again are difficult hurdles to overcome. If policy limitations cannot be understood and overcome these challenges will persist.

The end of the focus group highlighted an interesting discussing on where to take the local food movement in the future. It brought to the forefront some of the diverse perceptions as to what the local food movement is. Should a group be created that includes only food, or is the goal to support agriculture more generally? Should there be a criteria attached to membership or association with the local food movement in Elgin? While the discussion never resolved to these interesting questions there was general support among participants for a local food strategy to continue.

5.2. Key Informant Interviews

5.2.1. Key Informant Interview #1 - Greenhouse Operator

A greenhouse operator was interviewed in the hopes of addressing the potential for greenhouses to provide local products outside traditional growing seasons. The operator was quite optimistic about the role of greenhouses. The operator argued that it's already playing a major role in the local food industry, and it will be more prominent in the future. It may become more important as concerns related to climate change, water availability and other changes become more prevalent.

In a discussion on some of the challenges, the operator highlighted the enormous competition from other countries, especially Mexico. Labour is comparatively much cheaper. Another concern is the stability of the Canadian dollar against the American dollar. When the American dollar goes down "it's hard for us to compete and provide food at cheaper rates, because labour costs, gas, and other operations are beyond a producer's control". The operator also stressed on the importance of educational activities/programs for the consumers; "to make them educated about the local food and their role in our economy".

To address these challenges the operator suggested that people have to buy local produce. We have to support local farmers. The operator stated that if we lose the farms we lose jobs. We are interdependent. We will lose everything. The big problem in Canada is the lack of support for local production. Consumers have no idea where the food is coming from. Even Canadian companies do not support local production. The operator also pointed out awareness of a Canadian company buying chicken from Taiwan, despite the fact that it is available in large quantity in the local market. Buying local is good for us and good for Ontario. The consumers have the control, they should demand for local food.

The operator was not convinced about the validity of government incentives to encourage greenhouse production. The operator stated that there are programs in place, but no one is taking advantage of them. More programs need to be introduced. The government should have things in place so people can take advantage of these incentives.

5.2.2. Key Informant Interview #2 - Land Use Policy Expert

During a discussion with a land use policy expert a number of interesting opportunities and limitations were revealed. Some land use policies and practices pose certain challenges to local food. First, some municipalities have attempted to restrict livestock operations near urban areas because of odour or perceived health concerns (there is some legislation to protect against these restrictions). Communal (CO-OP) processing of products is desired by many farmers. If a processing facility serves multiple farms, planning legislation would view this as an industrial undertaking, hence would fall under industrial use policy and be subject to urban tax rates. Farmers would like to undertake this processing without being subject to urban or industrial legislation. Planners question why farms should get an advantage or be treated differently under legislation than a private or commercial food processor. Planning in Elgin is generally not looked highly upon since the County has never had a County planning department. Other comments were: the mixed industrial use and strip developments are deemed unappealing to some. Product consistency in terms of supply restricts attractiveness of local producers to consumers. Consumers will opt for distributors that can provide year round products over local producers who cannot, and greenhouse supply in Elgin County is limited.

At the same time planners recognize some opportunities that make themselves available to Elgin. In a Provincial Policy Statement, Ontario land use legislation protects and promotes the use of available land for all types and sizes of agricultural practice. The informant stressed, “Local food does not necessarily need to be small.” In order for local food to compete on a larger scale, the land needs to be made available for production. Speed networking activities in Elgin County have successfully connected growers with restaurants. They have engaged in business exchanges through providing samples and trading contact information. Secondary uses policy allows processing or retail facilities to be developed on farm properties as long as they serve the farm on which the product is grown. Elgin has recently hired a planner to develop a county planning department which may provide vision and support for new agricultural movements. Elgin is also blessed with well developed infrastructure (piped water and natural gas) that is appropriate for greenhouse production. The geography of Elgin County has some interesting opportunities. The ridge running along the lake creates a micro-climate making it a unique growing area, potentially for soft fruits. As well, irrigated former tobacco fields are potential sites for new innovations (including ethnic or specialty crops similar to activities undertaken in Norfolk County). Proximity to London, the 400 series highways and the large port at Port Stanley are all important distribution opportunities.

5.2.3. Key Informant Interview #3 - Wholesale Industry Expert

This key informant was identified for their knowledge of the wholesale industry. The wholesaler usually purchases products that are already prepared like flours and pastas from companies like PRIMO. However, some locally prepared products and locally-produced products are purchased by wholesalers, particularly in terms of fresh fruits and vegetables. These products are purchased through local companies like Smith Fruit in London. Wholesalers are now getting into more of the small, locally produced products including fruit and vegetables and meats and fish, like perch. They are getting the word out for them because a trend of consumer demand for local food over the last couple of years has been noticed. The demand for local food is mostly for fresh fruits, vegetables, beef, seafood and chicken.

The amount of local food purchased is hard to estimate, but it’s estimated by the key informant to be about 30% of total purchases. That’s because a lot of the food is processed, but if you broke it down then about 60-70% of the chicken is local and probably 70% of the beef.

Some challenges were identified by the wholesaler. One of the biggest challenges is that the demand is often greater than the supply. That’s the biggest downfall right now, supply and demand functionality. Either there’s too much supply and not enough demand or vice versa. And of course there’s the problem of the short shelf life of the fresh goods. Another challenge is the inability of the producer to meet our packaging requirements. This is an issue especially for more volatile items like seafood. The local fish farmers are producing but might not have the capacity to process and package it. Seasonality is not an issue for fish; however, through a fish program wholesalers can access fish all year round from a fish farm that’s stocked with fish from Lake Erie. It is constantly restocked so there’s no crossbreeding. Of course, seasonality becomes an issue with the produce. Very little is available fresh in the winter unless it’s coming from a greenhouse. In terms of consistency, consumers are aware that produce can vary from one week to the next but they do get worried if their tomatoes are bigger or smaller from week to week. For restaurants, consistency of their menu items is very important.
The wholesaler suggests that overcoming these challenges may just be a matter of growing into it. As the word gets out that there’s more availability of local foods and once the demand is more stable then the supply can go out and meet it. It is important that wholesalers don’t go out and get too much demand for the products. For example, with a fresh beef program started in

January 2010, one of the biggest challenges is that sometimes too much is sold and if the supply is inconsistent then the consumer will feel let down in the end. The informant was unaware of incentives or disincentives for local food on either side of the discussion. However, health and safety and food safety regulations were mentioned.

Even wholesalers are recognizing that local food is being recognized – things like the 100-mile diet – so it's starting to build a familiarity with everybody. As stakeholders continue to build the familiarity things will improve. The one thing that will not change is that the chain of restaurants will always be dollar based. The dollar will drive where they're going to buy their products from. It'll be the independents that are marketing fresh and local products.

5.2.4. <u>Key Informant Interview #4 - Food and Safety Public Health Inspector</u>

An interview was conducted with a food and safety Public Health Inspector from a nearby County. The Health Inspector explained potential legislative and regulatory barriers food purchasers for restaurants, hospitals, schools and other institutions may experience when buying local food products. The two main pieces of legislation that restrict what consumers may and may not purchase for resale are the Health and Promotion Act and the Food Premise Regulations. These two acts restrict restaurants and other institutions from purchasing certain types of milk, eggs, meat.

Milk must be pasteurized for consumers to purchase and resell. It is illegal to sell unpasteurized milk directly to the consumer, although the farmer is permitted to use unpasteurized milk for his/her and family consumption. A farmer rarely sells pasteurized milk from the farm. Common practice is for the farmer to sell unpasteurized milk to a pasteurizer, such as Nelson's or Beatrice. The pasteurizer sells the pasteurized milk to the consumer, restaurant or other institution. The quality of the milk then lies on the responsibility of the pasteurizer. Although milk products are not purchased directly from the farmer, it is common that local milk will eventually be sold to local consumers. There is a food safety importance to have the middle component of the pasteurizer to ensure the health and safety of consumers.

Farm fresh eggs, similar to milk, are only permitted for owner and owner's family consumption. If the farm has less than 97 birds, it is legal to sell "farm fresh" eggs, but not to restaurants, hospitals, schools or other institutions. These institutions must purchase graded A or B eggs for their consumers and customers. Eggs sales are determined by a quota system. The farmer buys quota of eggs and sells to the grader. The egg grader then sells these graded eggs to the customer. The responsibility for the product then falls on the egg grader facility.

Meat products are handled by a licensed butcher or abattoir. All meat products sold must have a stamp from an accredited inspector. Farmers are able to take their animal to the butcher or abattoir and can sell themselves after the meat is stamped. The farmer is also able to sell the animal directly to the butcher. The stamped meat is then the responsibility of the abattoir or butcher.

The sale of milk, eggs and meat all require a middle component to ensure food health and safety of the product. The benefits of the pasteurizer, grader and butcher are that the responsibility of the quality of the product rests on these facilities and not the farmers. These regulations limit the farmer from selling their products at a price of their choosing. Equipment for pasteurizing, grading or stamping meat are very expensive and not an option for most small scale farmers. It is difficult for a small scale farmer to produce a constant quantity of product to a customer. The purchaser may want to buy from one location instead of ten smaller scale local farmers. The middle component benefits the farmer in this sense, as they are guaranteed a market to sell to.

There are no regulations in the Health and Promotion Act and the Food Premise Regulations regarding farm-gate sales of vegetables and fruits. Purchasing local produce extends the shelf-life of the product and is therefore of better quality than products transported from outside the area.

5.2.5. Key Informant Interview #5 - Regional Abattoir Operators

Regional abattoir operators were interviewed in the hopes gaining an understanding of the impact regulations on local operations. First, general regulations were provided through correspondence with OMAFRA. In Ontario, all slaughter plants are either registered by the federal CFIA or licensed by the provincial Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA).

Meat processing plants (not performing slaughter), however, may be inspected by federal, provincial or municipal government. Meat plants shipping outside the province are registered and inspected by the federal CFIA. Meat plants processing and distributing in Ontario only are either licensed and inspected by OMAFRA or inspected (but not licensed or registered) by the local public health unit.

In 2005, under the Food Safety and Quality Act, OMAFRA began licensing some meat processing plants. If a meat plant performs a "Category 2 activity" (high risk activity) or if a meat plant performs a "Category 1 activity" (low risk) but distributes the product off-site (e.g. to another store or location), then the plant must be licensed by OMAFRA. The remainder of the meat plants (that do not distribute off-site and process only "low risk" products e.g. butcher shops) remain under the inspection of local public health units, subject to the Food Premises Regulation under the Health Protection and Promotion Act.

The abattoir operators were asked about their operation and how these regulations impact them. One of the abattoirs said they were provincially regulated, as they conduct custom slaughter for farmers. They would generally handle two slaughter (“kill”) days per week, beef one day and pork the other. They have noticed that the demand for custom slaughter is becoming less and less where there was once a big farm base. It was mentioned that not a lot of young farmers are coming into farming.

The operators are concerned that there needs to be more emphasis on local products in Ontario. They think it’s important to take a look at imported products and question why they are coming in so much cheaper while local farmers are suffering from this. They fear that they will not be able to keep their doors open. With HST increasing and the Hydro bill going up another 8%, it will become more and more difficult to keep meat chilled at the proper temperatures. They feel that the government needs to make the right choices. To regulate the market like this is just doesn’t work, it doesn’t make sense to have this put down on us. These regulations threaten the local farmers.

Small businesses like these abattoirs cannot afford to go federal. It would bankrupt them. One abattoir was built 35 yrs ago when OMAF (Ontario meat) approved their plan. Things have changed over time. They do not have an endless supply of money. They simply do not have the resources to meet these new regulations. “The government has gone wild.” They are only thinking about the food/quality safety act. The small abattoirs are not here to export. They are just for local farmers.

Their businesses are very concerned about food safety, but small fines don't do a thing to deter some processors. They need to make the fines heftier. Some processors are simply paying the fines and are not concerned at all. The fines are "nothing, they are laughing." Also, some operations are not screened. The interviewee suggests that a screening process that goes on the local food map should take place. If the regulations have to be put in, that's fine. All should be safe and taken care of and of course overseen. But some of this should be reimbursed. Some say, that is the price of doing business, but I think the government should pay for it". The business owner pays for it all. The money made in the business is just put right back into keeping it running. It ends up costing too much to run. It's all about food safety. But I would like to say, "I wouldn't sell a piece of meat that I wouldn't feed to my kids, I am proud of what I put out. You know where the meat is coming from, you can tell a customer, the cow has been fed this and it comes from here. This is a small community and you know the people".

When one abattoir operator was asked what they think the impact will be on the local meat industry and small farmers with regulation changes, the response was: The farmers will miss us if we close in a month, but call OMAFRA, they have all the answers. Another said, without them many farmers would have nowhere to go.

Some other main points were:

- The regulations are overkill and don't pertain to the smaller places. If you go into these local abattoirs, they are clean as a whistle.
- There may be the concern with smaller plant inspectors that they will inspect one or 2 plants and that would be it for the day, and it ends up costing too much money for the government when that is all they would work for the day.
- With changes in regulations and smaller abattoirs close, the meat will be sent out to a central kill plant, with one inspector for that kill floor, saving the government money but the idea is that the meat will be sent back, but there is no way you are going to be able to know if you are getting your animal back once it all goes to one central processing place.

It was also mentioned by one of the abattoir owners, a postcard that has been produced by the Perth/Oxford Local, National Farmers Union (NFU), and made available to the public to fill out and send to the Minister of Agriculture, Food and Rural Affairs.

It states:

> "Small, locally-owned and operated, provincially-inspected abattoirs are a key ingredient in safe, local food. They provide a crucial link between livestock farmers and the local food movement. As farmers, meat processors and consumers committed to local food, we are afraid that small, provincially-inspected abattoirs are disappearing from our communities. As the Minister of Agriculture, Food and Rural Affairs, we are asking you to help save the small abattoirs across Ontario."

5.2.6. Key Informant Interview #6 - Local Market Representative

An interview was conducted with a local market representative in order to obtain further perspectives on the state of local food in Elgin County and the role of local markets. The respondent identified the difficulty in first defining the term 'local food'. Who should define the term? Should established boundaries be used (e.g. county lines)? Using a strict geographical definition, like 100 miles, may be limiting.

The respondent explained that the key function of the market is to act as a distribution channel for local food. Even with sufficient supply and demand of local food, there needs to be mechanisms for getting the food from point A to point B. While the respondent noted that the farmers' market had been witnessing substantial growth, a number of challenges were also discussed, including the limited growing seasons of the farmers. The respondent mentioned how this challenge was overcome by one producer who, through greenhouse growing, was able to provide fresh produce year round.

Many of the sellers at the local market are resellers, as they have discovered this to make most economic sense to them. Often, farmers are driven to choose between saving their farms or ensuring that they grow everything they sell themselves. Farmers consider what the consumer wants and if the consumer is not demanding locally grown food then to them that market does not exist. In addition, farmers often become jaded because they have little control over where the product goes after it leaves the farm. In terms of policy change, farmers sometimes feel that either they are not consulted or their input is requested over and over and little change occurs.

A further challenge is in gaining political support as the local markets are municipally governed. As long as political priorities focus on job growth and economic development, it may be difficult for local politicians to see the benefits in strengthening the role of the farmers' market. It is difficult to understand the role of local food as long as the political language focuses on the benefits to the economy. The respondent felt this to be the case in many other small communities but believed that political support for local food was beginning to grow in many larger cities. Such support is the major key, the respondent believed, in the strengthening of the local food industry. Other counties that have developed specific policies addressing local food were discussed. These included requirements of certain percentages of local content from some institutional food providers and the development of guidelines for sourcing locally produced food.

Presently, the respondent noted, the food distribution system in the county revolves around grocery stores. The emphasis is on a system that is cost effective. Because local food tends to be more expensive to get into stores than products from food terminals, there are limited amounts of local food available in grocery stores.

From the respondent's perspective, the farmers' market is part of the larger food system and as such, does not operate in isolation. A future role for the market may be as a wholesale distribution system where producers and institutional consumers meet for exchange and the public market is a secondary function.

Regulation is often seen as an effective means for controlling the food market and, if reorganized, may be able to affect positive change. Presently, the system is ineffective as it squeezes out smaller players and offers success only to the big farmers. Current regulations may be affordable for large companies, but for small farmers they often make farming prohibitively expensive. This is the case, the respondent explained, for egg farmers who are required to send eggs to grading stations and need to produce on very large scales in order to make any profit.

As was seen by the tobacco industry, public demand can affect considerable change on political will and health care regulations. A similar process may occur with regards to public concern over the health impacts of GMOs and pesticides in the food system. Demands for food labelling may provide greater traceability and shed light on current health issues. However, this can only occur if the unhealthy impacts of eating poorly continue to be shown on a consistent basis.

The respondent emphasized the need to consider the big picture when addressing the local food system in Elgin County. A major problem is the prioritization of short-term cost effectiveness over long-term food security and sustainability in the region. While the respondent felt that Elgin had a long way to go in this sense, it was noted that there is presently a big push on local food as public support continues to grow. This is demonstrated in the growth in consumption of organics, for example. A huge shift in mindset is still required, however, and the political system needs more time to catch up.

The public is heavily influenced by corporate advertising and has been trained to be disconnected from their food. A role of the farmers' market may be to educate people in the benefits of local food, but there are some people who do not believe that there are problems with the present system or who are simply not interested in hearing. While there are pockets of people working towards change and a huge amount of information is now available regarding the benefits of local food, even well educated consumers sometimes just want the convenience offered by the conventional system.

The question is not so much whether the shift towards local food will occur, but when. Sometimes, a crisis is required before change will occur. Nevertheless, everyone has the power to make decisions and contribute to changing the present system for the better.

5.3. Surveys

5.3.1. Producers

5.3.1.1. Qualitative Results

How would you define the term local food?

Respondents defined the term "local food" by distance of food produced and distance sold. Eight ranges were identified:

- Less than 30 km (within the local community)
- Within Elgin County
- Less than 50 miles
- Less than 100 miles
- Less than 300 miles
- Within Southwestern Ontario
- Within Ontario
- Within Canada

The most popular response to define the term local food was food produced within a 100 mile radius of its point of sale.

Can you briefly describe what originally motivated you or what would motivate you to sell your product as local food?

A variety of motivations for producers to sell their food products locally were acknowledged. The most popular motivations for farms, orchards and greenhouses to sell locally were to cut down on transportation costs and receive a better dollar value for their products. Two equally important motivations noted by all types of producers, including wineries, were to showcase high quality products that allow for traceability and to ensure community access to these quality products. The majority of producer respondents value local sales to back their product and ensure customer satisfaction. These same respondents are dedicated to providing business to the community for good rapport and the community supports their business in return. Other motivations noted by farms and greenhouses are marketing potential is greater locally than externally; a large customer base in the area already exists; and producers can provide fresh products for customers who are showing an increase in demand to know where food comes. Elgin orchards provide a local agri-tourism component to their business, which has increased sales of their products.

Can you name the different organizations to which you sell your products?

The total response to naming the different organizations to which the producers sells their products was two-thirds of the total producers interviewed. Of the 20 that responded, many sell their products to a variety of organizations. The majority sell their products wholesale. This includes grocery stores, health stores, organic distributers, local wholesale stores, the Toronto Food Terminal, Restaurants and wholesale distributers outside of Canada. Of the 16 producers who sell wholesale, all own a farm and/or a greenhouse. No orchards or wineries sell their products to wholesalers. Both farm and winery owners (13 total) sell their products off their farm. Three farms sell to commodity traders or a commodity pool, Direct sale (to restaurants), or to a processor. Only one farm does not sell their products. Ten local markets were identified as a selling location by eleven of the respondents. St. Thomas Farmers' Market and the Aylmer Market are the most popular with five farms each and Horton St with three farms. The remaining markets utilized by producers include the Western Fair, Levant Market, Living Foods Market, London Markets, Woodstock Markets, St. Jacobs, and Ridgetown.

Of organizations to which you sell your products which would you identify as local?

Of the respondents who listed the organizations they sell to, 13 sell all of their products locally. These include farmers markets, off the farm retail, and grocery stores in Elgin County. Only five respondents, all farms, sell outside of Ontario.

Which Associations are you a part of?

Consumers presented a wide diversity of organisations with which they were associated. The most frequent association identified by producers were the Ontario Federation of Agriculture and the Ontario Farm Fresh Marketing Association. Others were part of the Elgin Fruit and Vegetable Growers Association and London Area Organic Growers Association. Finally, consumers also associated with a number of sector specific groups such as Chicken Farmers of Ontario, Grape Growers of Ontario, and Ontario Greenhouse Vegetable Growers.

What sorts of challenges do you face in producing local food (i.e. Distribution, Processing, Storage, Government Policies, Affordability/ profitability, Marketing to Customers, Linkages with Customers, or Environmental Constraints)?

The respondents listed a variety of challenges in producing and selling local food. The most common constraints are the cost of distributing and transporting goods, lack of marketing and advertising opportunities, and the loss of small abattoirs. Farm and greenhouse owners experience these challenges at a greater affect than orchards and wineries reported. A number of orchards responded to the challenges of sending their products to a processing facility. All types of producers identified government regulations and lack of subsidies as a major issue that needs to be changed for producers to maintain profitability. Three farm owners suggested the cost of equipment and supplies, the demand for large amounts of products even during out-of-season and the weather present challenges for production. The recession affected all of Ontario, but is obviously being felt in Elgin County also. Only four respondents, one winery and three farms are not experiencing any challenges.

Which government incentives do you use?

A few specific government initiatives were listed by producers as helping them with their businesses. Examples include ‘Food Safety and Traceability Initiative’, food and wine show at the western fair, and agri-invest.

Where do you see your business in 5 years?

One orchard, two wineries and 18 farms predicted where they see their business in the next five years. The orchard, one winery and six farms see their business expanding; six farms see no change, but hope to maintain their production; three farmers hope to retire in five years time; and three farms and one winery are working towards diversifying their business.

Where do you see the market in 5 years?

The same 21 respondents predicted where they see the market going in the next five years. The most popular prediction (seven farms and one orchard) see an increase in demand for local food. Another four farms suggested an increase in demand for local and organic. The remaining responses predict an increase in niche and diversified areas, increased imports, increased regulation or have no comment of the market in five years.

Do you think that local food can play a role in the future or your business and where you see the market going?

When asked if local food can play a role in the future of the farming business, 16 replied yes. The reasoning behind local food playing a strong role is because the respondents feel there is a strong sense of community in Elgin County, and everyone supports each other through “thick and thin”. Of these “yes” respondents, ten believe their needs to be improvement also. Transportation to local facilities, public education regarding local and organic food, and greater support from government, such as subsidies would strengthen the role local food plays in producer businesses. The four respondents who do not think local food can play a role are experiencing a lack of local consumer demand and would like to explore new markets at a larger geographical scale.

Would local food terminals aid in the establishment of a local food industry?

The issue of establishing a local food terminal in the Elgin County area found mixed results from 20 respondents. Eight producers do not want to see a local food terminal. These respondents suggested that more efforts should be made to connect local producers with local stores. Producers may experience a profit cut if a middle distributor is introduced, and would prefer to sell directly to the customer. Five farms would like to see a local food terminal to increase the local purchasing of their products. These respondents would benefit from selling all products to a food terminal where it could then be distributed to local stores without the hassle of transportation and multi-distribution problems. Seven producers are not sure if a food terminal in their area would benefit or harm their business. There was some suggestion to investigate potential opportunities or constraints to establishing a food terminal in London or Elgin County.

Do you have any additional comments you'd like to make about local food and its importance or impact in the local economy?

The producer respondents promote the sale of local food. This will reduce the carbon footprint transportation causes, and increases traceability of the products. The producers also identified needs to improve the sale of local food in Elgin. There is a need to support processing plants, abattoirs, connections between farmers and consumers, increase marketing opportunities and increase support from the government.

5.3.1.2. Quantitative Results

Organization Descriptions

A variety of types of food producers were surveyed in the present study. Several of these organizations classified themselves as mixed operations. Most called their operation a farm. Two respondents indicated that their operation was exclusively an orchard, while one each identified themselves exclusively as a winery, a beehive or a farm market (See Appendix A-Table 4).

The majority of organizations began operations within the last 20 years; however several respondents also indicated that they began operations in either the 1950s or 1970s, with over one third of respondents beginning operations in these decades (See Appendix A-Table 5).

Nearly 50% of operations surveyed were 100 acres or less in size. There were fewer organizations represented as larger areas were considered. More than one quarter of organizations were in the 100-300 acre range, with only one respondent with an operation larger than 500 acres (See Appendix A-Table 6). Of those producers surveyed, most used less than 100 acres of cropland, with over half of all respondents indicating that their cropland use was less than 200 acres. Operations using more than 300 acres of cropland were represented by only 19.4% of respondents (See Appendix A-Table 7).

Many farms indicated that they hired workers on a seasonal basis. Operations with seasonal workers comprised 42% percent of those surveyed. Meanwhile, 36% of respondents were operations who hire staff all year round and slightly over 30% of operations hired part time or other forms of staff (See Appendix A- Table 38). It was most common for operations surveyed to hire fewer than five employees or more than eleven. Just over one third of operations indicated less than five while just under one third indicated over eleven employees. Only 13% of operations surveyed hired between six and ten employees (See Appendix A- Table 39).

Most producers indicated that they were not members of any associations, with a strong 40% minority indicating some sort of association membership (See Appendix A-Table 36).

Local Food Sales

The majority of survey respondents indicated that some quantity of their food sales were local. Only 10% of respondents indicated that they do not produce food for local sale. A total of 11 producers did not indicate whether or not they produce food for local sale (See Appendix A-Table 1). Of those organizations that produce food for local sale, well over half indicated that over 75% of their products are sold locally. It is important to note that many respondents did not indicate the percentage of their products sold locally. While most producers indicated that most of their sales are local, just over 20% also indicated that the majority of their sales are not local (See Appendix A- Table 3).

Most organizations selling local food began to do so within the last 20 years. Overall, 70% of all respondents indicated that they began producing local foods since the 1980s. Only two operations indicated that they began selling locally before 1970 (See Appendix A-Table 2). The vast majority of respondents indicated that they sell their products through wholesale and retail channels with well over three quarters of respondents indicating that they sell their products to wholesalers and/or retailers. Direct selling and farmers' markets were the next two most common selling methods of producers representing 29% and 45% of respondents respectively. Sellers to commodity traders and commodity pools combined represented approximately 23% of all respondents (See Appendix A-Table 29).

38% of operations surveyed had gross sales of less than $100,000 in 2009. Over 80% of all respondents indicated gross sales of less than $500,000, while only two operations indicated gross sales of over $1,000,000 (See Appendix A-Table 35).

The vast majority of producers indicated that there were no incentives that would encourage them to sell their product locally. A full 85% felt that government policy did not encourage their local food activity (See Appendix A-Table 37).

Food Products Produced and Seasonality

Vegetables were the most common category of products produced by those surveyed, with nearly half reporting producing vegetables for sale. Meanwhile, dairy and meat were the least commonly produced category, representing only about one quarter of producers (See Appendix Table A- 8).

Soybeans and corn were by far the most commonly produced grains and legumes among those surveyed, with more than a quarter of producers reporting selling these. Fewer producers grew wheat and barley and only one producer reported growing each of alfalfa, lavender augustifolia and rye (See Appendix A- Table 9). Producers reported selling grain products year round, with the exceptions of oats and rye, which were sold between October and November and in July, respectively (See Appendix A-Table 10).

Apples and strawberries were the most commonly produced fruit products among those producers surveyed, with 16.1% of producers growing each. Raspberries, plums and pears were the next most commonly produced fruits. Producers also grew cherries (sweet and sour), peaches, other berries (Saskatoon, blueberries, elderberries), watermelons, currants (black and red), nectarines and wine grapes (See Appendix A-Table 13). Wine was the only fruit product available year round from the producers surveyed. Other fruits were available from July until as late as December, in the case of blueberries (See Appendix A- Table 14).

Tomatoes were the most commonly produced vegetable crop among those surveyed. Corn and peppers were also commonly produced, with about a quarter of producers growing these. Potatoes, pumpkins, green beans and cucumbers were produced by between 15% and 20% of producers surveyed. The remainder of vegetable crops were grown by less than ten percent of producers (See Appendix A-Table 17). Vegetable crops were sold between April and December. Earlier crops included onions, lettuce and spinach and later crops included potatoes, pumpkins, squash, sweet potatoes, leeks and Brussels sprouts (See Appendix A- Table 18).

Beef was, by far, the most commonly produced meat and dairy product among those surveyed, with nearly 20% of producers raising beef. Dairy products, pork, chicken and turkey were next most commonly produced. Some lamb, veal, eggs, rhea and horsemeat were also produced (See Appendix A- Table 21). All meat and dairy products were sold year round by producers, with the exception of lamb, which was available only March through December (See Appendix A- Table 22).

The most common "other products" sold by producers included preserves, honey and wine (See Appendix A- Table 25). Most of the other products sold by producers are available year round, with the exception of herbs, salsa, baked goods and coleslaw, which are available between May and December (See Appendix A-Table 26).

Quantities and Formats of Food Sold

Grains were sold in a variety of formats: by the truckload (wheat and soybeans), as prepared poultry feed (wheat and barley), in bushels (soybeans), in bales (alfalfa) and in tins or jars (lavender augustifolia) (See Appendix A-Table 12). The producers surveyed sold fruit in a variety of formats. Formats included: individuals, bushels, bags, bins, pints, quarts, flats, punnets, and others (See Appendix A-Table 16). Like fruit products, vegetables products were sold in a great variety of formats. These included: pints, quarts, baskets, bushels, flats and cases (See Appendix A-Table 20). Meat was sold in a number of formats, including ground, in pieces, ½ sides, ¼ sides and the entire animal (See Appendix A-Table 24). As other product types, other products were sold in a variety of formats. Formats included jars (salsas, other preserves, and honey), bags (maple treats, prepared bags), and bottles (See Appendix A- Table 28). Quantities of food sold by producers are presented in Appendix A-Table 11, Table 15, Table 19, Table 23 and Table 27.

5.3.2. Consumer

5.3.2.1. Qualitative Results

How would you define the term local food?

The consumer respondents defined the term "local food" by distance of food produced and distance purchased. They frequently referred to local farmers and the local area generically. Several themes are identified below:

- food grown locally (from the area)
- within 50 miles; within 50 miles
- local farmers

- within Elgin County (and adjoining counties)
- Ontario grown
- within South-western Ontario
- local grocery stores within 15 min radius
- within 100 miles; within 100 miles
- purchase from companies who purchase locally

The most popular response to define the term local food was food produced or grown locally or from local farmers.

Can you briefly describe what originally motivated or what would motivate your organization to purchase local foods?

A variety of motivations for consumers to buy their food products locally were acknowledged. The most popular motivation for consumers to purchase locally was the freshness of the product. Two other notable responses were focused on the support of community. First, many identified a desire to support the community and farmers and encourage local relationships. Still others were interested in supporting local business and local economies. Proximity and travel was also an important theme identified by several consumers as a motivating factor for purchasing local. Ecological and environmental concerns were mentioned by few consumers though were noted by several consumers. Specifically, in one case the use of chemicals and pesticides by large scale operations was a concern of one consumer. A point that was noted as both a motivation and something that might be an important motivator would be the cost of product. Some felt that buying local was cheaper while others identified that if local products had lower costs it would motivate them more to purchase locally. Related to low cost, some consumers noted volume of product availability as something that might make them more inclined to buy local. Finally, regulated quality assurance was identified as an issue for some consumers and the need to feel reassured that local products that are being purchased are of high and safe quality.

Can you name the different organizations from which you purchase your products?

The total response to naming the different organizations to which the consumers purchase their products was two-thirds of the total consumers interviewed. Of the 24 that responded, many purchase their products to a variety of organizations. The majority purchase their products through wholesale food distributors. These include Bedell's Foodservice Distributors, Gifford's Wholesale Produce, Summit Food Distributors, and Morton's. Grocery stores and other distributors were additionally mentioned such as Courtney’s Confectionary, Costco, Canada Bread, and Sysco. The majority of respondents to this question were restaurants which highlights the specific purchasing patterns of local restaurants in Elgin County. It is unknown what local food content is sold by these wholesale food distributors and grocery stores as they weren’t interviewed as part of this study.

Of organizations from which you purchase products which would you identify as local?

Consumers identify a wide variety of retailers, distributors and direct sellers as local. Large super markets were frequently identified as local organizations. It is interesting to note that many consumers identified organizations in Middlesex County and the city of London as local. Farm markets and farms themselves were identified as local but were infrequently identified as a source from which consumers buy their products. Some wholesale distributors were also identified by consumers as local and like producers were the most frequent player in terms of product distribution.

Are you part of any associations?

Consumers presented a wide diversity of organisations with which they were associated. The most frequent association identified by consumers was with the St. Thomas-Elgin Tourist Association. Several restaurateurs indicated their membership with the Canada Restaurant and Food Services Association (CRFA). Others were part of the Restaurateurs Independent Buyer's Association. Finally, consumers also associated with a number of sector specific groups such as educational groups, health boards or accommodations organizations.

What sorts of challenges do you face in purchasing local food (i.e. Distribution, Processing, Storage, Government Policies, Affordability/ profitability, Marketing to Customers, Linkages with Customers, or Environmental Constraints)?

The respondents listed a variety of challenges limiting their ability to purchase local food. The dominant theme identified by consumers was the availability of product. Some consumers do not feel that the products they need are easily accessible locally when they want it. Inconsistency of product availability is difficult for some consumers, particularly restaurants. Seasonal limitations were noted. Similarly, delivery and distribution were identified by several respondents as a particular difficulty. Some consumers indicated that if products were delivered it could overcome this challenge. As noted in the motivation discussion, price is an important challenge. Many consumers feel that purchasing locally is more costly than "mainstream" food purchasing. Government policy was also identified by several consumers. In particular regulations related to food safety and quality assurance (i.e. eggs and milk) made some consumers hesitant or unable to by local products. Time constraints were also noted, tending to lend to the theme of convenience. Some seemed to feel that the inconvenience of accessing local food was a particular challenge that they felt limited their engagement in local food activity.

Which government incentives do you use?

There were no government incentives listed by consumers as encouraging them to purchase local food.

Where do you see your business in 5 years?

Many consumers were focused on the future expansion of their business. It was clear that expansion and improvement of their operations were the highest priorities identified by consumers. Few had a bleak outlook on the future of their business. Some hoped they could maintain operations or perhaps change locations, while others felt their business might decrease, with two noting that they were going out of business. One business cited government legislation as their reason for closure. Interestingly, several consumers expressed a desire to sell more local and organic products in their operations in the next five years.

Where do you see the market in 5 years?

Consumers reflected similar ideas about the future of their business and the future of the market. The most frequent responses addressed improving and expanding the market. Several thought that the increased interest in local food will lead to availability of local and organic products. Several producers were less optimistic expressing little confidence that the market would change with some indicating that they felt that the market could “go down” or that it may lead to “financial trouble”. Still others expressed concerns of high minimum wage, high utility charges and high prices.

Do you think that local food can play a role in the future or your business and where you see the market going?

Many consumers seemed uncertain about the future of the local food in their operation. Many noted government legislation (i.e. quality and health regulations) as a limiting factor in their ability to adopt local food. Several respondents noted that the local food market needs support in terms of policy, promotion and awareness. The dominance of larger business over smaller business was noted by one restaurant operator. A common concern once again was uncertainty over the price and distribution of local products. Two stressed the importance of the preference of the customer, speaking to their desire to offer products that the customer desires.

Would local food terminals aid in the establishment of a local food industry?

The most frequent response by consumers regarding whether they felt a food terminal was valuable was simply “yes”. By a wide margin consumers indicated that they felt that a food terminal would be helpful. Far fewer respondents indicated that they did not think that it would help. There were some that indicated that a food terminal could be used to lower costs and improve sales to consumers, including restaurants. Some other did indicate that they didn’t feel that is was worth the effort for little result. Some indicated that support and awareness were more important considerations.

Do you have any additional comments you’d like to make about local food and its importance or impact in the local economy?

For consumers one of the primary comments they reiterated was the need to support the community. They indicated that supporting local farmers and the local economy was important to them. Some consumers however indicated some of the difficulties that they face in incorporating local food into their operations including consistency of product availability, quality and limited awareness about local food. Two important other comments by consumers were the value of freshness and the importance of being able to identify local food through labelling.

5.3.2.2. Quantitative Results

Organization Descriptions

A diverse set of consumers was surveyed. Most consumers identified themselves as restaurant operators as they represent over 50% of all consumers surveyed. Three school cafeterias were surveyed while a hotel, a bar and institutional food services (child care centre, college and hospital) were all represented by one respondent each. (See Appendix B-Table 43).

Most consumers indicated that their operations had begun within the last 20 years as over 60% of consumers indicated they began operations since 1990. Just over 12% of operations indicated that they had been established before 1960, giving the survey a wide range of older and newer consumers. (See Appendix B-Table 44).

Most operations indicated that they had either full-time or part-time employees working in their organization, at 55% and 64% respectively. Just over 20% of consumer respondents indicated that they hired seasonal staff. (See Appendix B-Table 74). It was most common for consumers surveyed to hire fewer than five employees or more than eleven. One third of operations indicated that they had more than eleven employees, while just over one third indicated that they had less than five employees. Approximately one out of five consumers surveyed hired between six and ten employees. (See Appendix B-Table 75).

When asked about external relationships, 83% of respondents indicated that they were members of at least one association. (See Appendix B-Table 72).

Local Food Purchases

The vast majority of consumers interviewed indicated that they indeed purchased local food, with only 7% of respondents indicating that they did not purchase food locally (See Appendix B-Table 40). For many consumers local food makes up less than 50% of their total food purchases. Indeed a full one third of consumers indicated that less the 25% of their purchases were local. Conversely however, nearly one quarter of consumers surveyed indicated that over 75% of the product they purchase is local food. (See Appendix B-Table 42).

Over 50% of consumer organizations indicated that they had begun purchasing local food within the last ten years, with nearly 90% indicating that they began purchasing local food after 1980. (See Appendix B-Table 41).

Over three quarters of all consumers indicated that they purchased their products from wholesalers. Direct purchases and retail purchases were each well represented by respondents coming in at just under and just over 50% respectively. One consumer also indicated that they purchase from a commodity trader. (See Appendix B-Table 65). Just over 50% of consumer respondents estimated their gross sales in 2009 between $250,000 and $499,999. Gross sales of under $99,999 or over $500,000 were rare in 2009 among consumers surveyed. However, 29% reported sales between $100,000 and $249,999 in 2009. (See Appendix B-Table 71).

When government relationships were considered, all consumer respondents reported that they did not feel that there were any government incentives to encourage them to buy local food. (See Appendix B- Table 72).

Food Products Purchased and Seasonality

A small percentage of consumers surveyed reported purchasing grain products. Of those grains purchased, wheat, barley, oats and beans were the most common, with between 6% and 15% of consumers buying these. These grains were, however, usually purchased in processed forms. (See Appendix B-Table 45). The grains purchased by consumers were purchased year round, with oats particularly purchased between May and July. (See Appendix B-Table 46). Apples, strawberries, grapes and blueberries were the most commonly purchased fruit products among those consumers surveyed. Raspberries, peaches, watermelon and oranges were also common purchases. (See Appendix B-Table 49). Consumers reported purchasing their fruit products year round, with some buying certain fruit when in season locally. Fruits purchased specifically when in season included: peaches, sour cherries, plums, blueberries, and cranberries. (See Appendix B-Table 50).

Tomatoes and onions were the most commonly purchased vegetables products among those consumers surveyed, with about 90% of consumers purchasing these. Potatoes, peppers and cucumbers were also commonly purchased. (See Appendix B-Table 53). Like fruit, consumers reported purchasing vegetable products year round. Several consumers, however, noted that they purchased vegetables when in season, namely between April and November. (See Appendix B- Table 54).

Chicken was the most commonly purchased meat and dairy product among the consumers surveyed. Dairy products, beef and fish were also common purchases. (See Appendix B-Table 57). Meat and dairy products were purchased year round by consumers. (See Appendix B-Table 58).

Honey was the most common ‘other’ product purchased, with nearly 40% of the surveyed consumers purchasing honey. Herbs, preserves, maple syrup and wine were also relatively common purchases with between 20% and 30% of consumers purchasing each of these. (See Appendix B-Table 61). ‘Other’ products were purchased year round by consumers. (See Appendix B-Table 62).

Quantities and Formats of Food Purchases

Consumers reported purchasing grains in a variety of formats, including: by the pound, by the package, and in bulk. (See Appendix B-Table 47). Consumers purchase fruit in a great variety of formats, including: fresh, frozen and canned, individually, and in bushels, bags, cases or flats. (See Appendix B-Table 51). Consumers purchase vegetables in a great variety of formats, including: fresh and frozen, in cases, bags, boxes, as well as individually on their own. (See Appendix B-Table 55). Consumers reported purchasing meat in both fresh and frozen formats and in pieces, ground, in cases, bags and boxes. (See Appendix B-Table 59). ‘Other’ products were purchased in a variety of formats, including: in jars, bottles, boxes and cases. (See Appendix B-Table 63). Quantities of consumer purchases are detailed in Appendix B-Table 48, Table 52, Table 55, Table 60, and Table 64.

6. <u>Discussion</u>

The following section considers some of the most notable implications of the data reported in the section above. It addresses important challenges to the establishment of a local food system in Elgin County, such as product availability, networking and policy. Presently, Elgin County is part of a globalized food market, which connects consumers with distant sources of products at the lowest prices possible. While there is already both demand and seasonal supply of all products that can be produced in the Elgin climate, there appears to be a relative disconnect between local production and consumption. By addressing some of the opportunities and challenges identified in this report, we may aid in the establishment of a viable local food system in Elgin County.

Future local food efforts may build off of existing initiatives such as the local food map and marketing for the International Plowing Match. These efforts can harness the already existing desire to support local food among many local consumers. Among producers, strong motivating factors for selling food locally include reduced transportation costs, supporting local economies, and the promotion of agri-tourism. However, such benefits are presently hampered by business realities and the restrictions of seasonal availability and policy restrictions. Over 90% of producers and consumers state that they already sell or produce some local food, which further demonstrates the strong role that locally-produced food plays in the County.

However, strong motivations are presently hampered by a lack of common understanding of the term ‘local food’ itself. Definitions of local food differ largely based on the geographical distance used to bound the local food production zone. The most commonly expressed definition of local food expressed by participants in this study was ‘food produced and consumed within 100 miles’. This popular definition also aligns with the geographical boundaries of Elgin County. Even with the establishment of a common definition, much demand is currently being met from outside of the County. In order to strengthen the local food system, education of consumers is vital if the benefits of local food are to outweigh the apparent convenience of the present model.

6.1. <u>Product Availability</u>

A major challenge for local producers and consumers is the difficulty in supplying and sourcing food products year round. Institutional consumers require fresh food throughout the year and currently seek out products from warmer climates in order to suit customer preferences. Despite the globalized nature of the present food system, there are numerous opportunities for connecting producers and consumers in Elgin County. Vegetables, meat/dairy, fruits and other products are all locally produced and demanded by consumers across the County. From the data, small quantities are demanded by consumers whereas large quantities are supplied by producers, this disconnect needs to be adjusted so that supply provides products in the format demanded.

Based on the data collected in this survey, the following product-specific opportunities have become apparent:

- Fruits
    - Apples, strawberries, and raspberries are the three most supplied products by producers
    - Apples, strawberries, and blueberries are the most demanded product by consumers
    - Biggest issue: consumers demand products year-round while most products are only available seasonally
- Vegetables
    - Tomatoes, corn, peppers, potatoes, and pumpkins are the five most supplied products by producers
    - Tomatoes, onions, potatoes, peppers, and cucumbers are the most demanded products by consumers
    - Onions are one of the vegetables with greatest consumer demand and have a relatively long shelf life but are not currently a predominant vegetable crop of producers surveyed. This may indicate a potential opportunity for farmers.
    - Biggest issue: consumers demand products year-round while most products are only available seasonally
- Meat/Dairy
    - Beef is the most supplied product by producers
    - Dairy products, beef, pork and chicken are the most demanded products by consumers
    - Beef is both demanded and available year round, but current regulations and policy are cited as challenges in forming strong producer-consumer connections.
    - Pork and chicken may be potential opportunities for farmers
- Other
    - Herbs, preserves (i.e. jams/jellies), honey, maple syrup, and wine are most supplied and demanded products by producers and consumers

- All products except for herbs are produced and demanded year-round

Greenhouses are already playing a major role in the local food industry, and may become more prominent in the future as concerns related to climate change, water availability and other changes become more prevalent. According to a key informant there are government incentives to encourage greenhouse production, but few operators are taking advantage of them. High capital costs during start-up most likely pose the strongest disincentive to pursuing this strategic approach. Ultimately, greenhouses provide a means to produce crops year round to supply consumers with the products their customers are demanding. This option needs to be investigated further.

6.2. Networking

Effective networking between producers and consumers is key to the development of a successful local food strategy, and existing associations may be useful resources to utilize. The main associations that producers reported membership in were the Elgin Federation of Agriculture and the Ontario Farm Fresh Marketing Association. Meanwhile, the most commonly cited associations among consumers were the Canada Restaurant and Food Services Association and the St. Thomas-Elgin Tourist Association. Both the Elgin Federation of Agriculture and the St.Thomas-Elgin Tourist Association are based within the County, perhaps with increased membership among food producers and institutional consumers and effective communication between their associations, stronger connections can be made in support of the local food system.

The dominant ways that producers sell their products are wholesale, retail, and local food markets, whereas consumers buy their products through direct purchase, retail and wholesale. As retail and wholesale are already common buying and selling methods for producers and consumers, these distribution channels may present opportunities for local food growth. Interestingly, grains, meat and dairy and vegetables are predominantly sold through wholesale methods while retail is the predominant method for selling fruit. On the consumer side, vegetables are the most common product type for direct purchase, which may indicate a reasonable starting point for future local food initiatives. These dominant methods of buying and selling products are the important transfer points that need to be fully utilized as part of any local food strategy.

Local farmers' markets offer another essential linkage in the development of a local food strategy in Elgin County. Whether markets are designed to sell through wholesale to institutional consumers or directly to consumers at the household level, they provide the 'one-stop shop' convenience that has become valued in today's food system. More conventional wholesalers are also recognizing the value and consumer demand for locally produced products including fruit and vegetables and meats and fish, like perch. In an interview, a local wholesaler noted a trend of increasing demand for local food in recent years. The respondent added that concepts such as the '100-mile diet' are becoming better recognized and as this familiarity grows this helps to strengthen the local food economy. The existing networks in the wholesale model may offer another channel for better connecting local producers and consumers.
Additionally, wholesalers have expressed a desire to purchase more locally produced products.

Local food terminals may present an alternative approach for connecting producers and consumers but many producers are wary of terminals due to the potential price increases added by another step in the distribution process. In general, consumers seem to support local food

terminals as central purchasing locations but many smaller operations question whether such a model would be practical option for them.
Local food terminals could provide an alternative strategy to keep local food in the county and reduce transportation costs; however, producers are wary of these initiatives as they would add an additional middleman which will further deteriorate their profits which are already out of proportion with products brought in from out of county and country through globalization. These connections between producers and consumers need to be fully explored in order to understand so that effective strategies can be developed.

6.3. Policy

An additional challenge in the establishment of an effective local food system appears to be insufficient government support. None of the consumers surveyed were aware of any government incentives that would encourage them to purchase local food. On the other hand, two producer respondents indicated that supportive government programs included programs for advertising (my pick), trade shows and agri-invest.

A local food movement can be both encouraged and limited by policy. The sheer number of policies that can impact local food activity can be intimidating and complicated. Federal and provincial policies regarding market activity, food safety, land use and taxation all play an integral role in the success or failure of a local food system. Many policies are often sufficiently general that municipal or county policies can play an important role in the promotion of agriculture and short supply chains at the local level. It is essential that local food stakeholders understand the policies that apply to their operations if they are to advocate policy makers to consider the value of local food. The ability to argue the economic benefits of a well functioning local food system will go a long way in encouraging policy makers.

Food safety policies in particular frustrate small scale farmers. Processing foods and meeting standards can be costly and often requires technology and infrastructure that are beyond the means of some producers. At the county and municipal level much advocacy can be done through the economic development, agriculture and health sectors to influence the county and community development. The Health Board in the Region of Waterloo has successfully incorporated their local food strategy into the county plans. The Waterloo Region shows more than simply interest on the part of policy makers. It actively supports and promotes local food. Local food stakeholders will have a much stronger influence on and understanding of policy if government officials are actively engaged in local food promotion.

7. Conclusions

Currently, the main challenges experienced by producers appear to be distribution and transportation, lack of marketing and advertising, lack of government incentives, and consumer demand for products out of season. Meanwhile, the main challenges experienced by consumers are lack of seasonal availability, sometimes higher costs of local options, and regulations related to food safety and quality assurance. Ultimately, consumers appear keen to support local farmers and their communities, but the above challenges make it difficult for the necessary linkages to be formed. Nevertheless, both sides see local food as part of their future as public awareness and demand for local foods increases. Demand may increase supply but government support is also necessary in order to bring about the coordinated policy that will maintain the local food economy in the long term. Finally, the pride and strong sense of community already present in Elgin County will be fundamental in the promotion of local food in the future.

Elgin County is currently seeking new forms of economic development to help address the downturn that resulted from the shrinking manufacturing sector. While the area has a long history of agricultural vibrancy, the dominance of the present global food system presents challenges to the establishment of an economically viable local food system. The capacity to establish an effective local food system requires public support and strong producer-consumer networks in order to bring greater attention to the health, environmental and economic benefits of a local food system.

An understanding of the diverse views of stakeholders is key in the establishment of a successful local food system. Because some vaguely understood terms such as “sustainability” can contribute to a lack of cohesion among stakeholders, there is a need to strengthen communication, education and awareness strategies. Focus may be well developed through a central body through which diverse needs and perspectives of stakeholders can be merged into a more coherent collective voice. A well-organised movement not only provides focus, but also adds capacity and validity to the voices of advocates. Meanwhile, the marketing of local food, including the use of labelling and increased product identification and visibility, is key in the growth of the movement. However, if not supplemented with an effective public education and awareness campaign, this marketing could nevertheless fail to reach consumers. At the same time, while direct sales are an important part of a local food movement, they are limited in the number of consumers that they can reach. New relationships with retail outlets and public institutions may allow producers to access new markets and increase economic viability.

Elgin County, like many other predominantly rural regions, now has the opportunity to renew a local way of distributing and consuming food. There is an emerging awareness and support that make this an opportune time to pursue concerted local food efforts like those outlined above. As suggested by the current literature, a local food system that is focused, communicative and progressive can provide a viable, sustainable and ethical way forward for a region.

8. Recommendations

The following recommendations are made as part of this Local Food Study towards the goal of developing a strong local food system in Elgin County:

1. Networks need to be strengthened to help engage the local community more effectively.
2. Strong, local and coordinated policy is needed to develop local food systems in Elgin County, which allow food to be traced, local markets to thrive, and regulations that don’t hinder the success of small operators.
3. Further research is needed to address the main concern of consumers which is lack of consistent availability of products. The viability of greenhouses to meet this demand is a potential long-term strategy worth investigating.
4. Institutional consumers are an excellent starting place for local food promotion efforts.
5. Household consumers need to be made aware of the wonderful food products local farmers grow each and every year. These products are fresh, and of high quality, and it is critical they be given space on grocery store shelves.
6. Intermediaries such as local food terminals and local food markets are essential to bring the field to the fork.

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Appendix A – Producer Quantitative Results

Please note where respondents were given one option to answer question frequencies total 100%, otherwise no total is given.

Table 1 - Does Your Organization Produce Local Food?

Does Your Organization Produce Local Food?	Frequency	%
Yes	18	90.0%
No	2	10.0%
Total	20	100.0%

Missing Values = 11

Table 2 - What Year Did Your Organization Begin Producing Local Food?

What Year Did Your Organization Begin Producing Local Food?	Frequency	%
2001-2010	6	21.4%
1991-2000	9	32.1%
1981-1990	7	25.0%
1971-1980	4	14.3%
1961-1970	1	3.6%
1951-1960	1	3.6%
1941-1950	0	0.0%
Total	28	100.0%

Missing Values = 3

Table 3 - What Percentage of Your Sales Could be Considered Local?

What Percentage of Your Sales Could be Considered Local?	Frequency	%
0-25	4	22.2%
26-50	0	0.0%
51-75	3	16.7%
76-100	11	61.1%
Total	18	100.0%

Missing Values = 13

Table 4 - Which of the Following Best Describes Your Organization?indicate when it adds to > 100%

Which of the Following Best Describes Your Organization?	Frequency	%
Farm	23	74.2%
Greenhouse	3	9.7%
Winery	3	9.7%
Orchard	4	12.9%
Other	2	6.5%

Table 5 - What Year Did Your Organization Begin Operations (Year Established)?

What Year Did Your Organization Begin Operations (Year Established)?	Frequency	%
2001-2010	6	20.7%
1991-2000	4	13.8%
1981-1990	9	31.0%
1971-1980	7	24.1%
1961-1970	0	0.0%
1951-1960	3	10.3%
1941-1950	0	0.0%
Total	29	100.0%

Missing Values = 2

Table 6 - What is the Total Area of Your Farm in Acres (Including Rented and Owned)?

What is the Total Area of Your Farm in Acres (Including Rented and Owned)?	Frequency	%
0-100	14	48.3%
101-200	4	13.8%
201-300	4	13.8%
301-400	3	10.3%
401-500	2	6.9%
500+	1	3.4%
Total	28	96.6%

Missing Values = 3

Table 7 - What is the Total Area of Cropland (Including Fallow Land) of Your Farm?

What is the Total Area of Cropland (Including Fallow Land) of Your Farm?	Frequency	%
0-100	13	44.8%
101-200	4	13.8%
201-300	5	17.2%
301-400	0	0.0%
401-500	3	10.3%
500+	1	3.4%
Total	26	89.7%

Missing Values = 5

Table 8 - Products Sold by Producers

Product Category	Frequency	%
Grains and Legumes	10	32.3%
Fruits	12	38.7%
Vegetables	15	48.4%
Dairy/Meat	8	25.8%
Other Products	11	35.5%

Table 9 - Grain and Legume Products Grown/Sold by Producer

Product	Frequency	%
Soybeans	8	25.8%
Corn	8	25.8%
Wheat	4	12.9%
Barley	2	6.4%
Alfalfa	1	3.2%
Lavender Augustifolia	1	3.2%
Rye	1	3.2%

Table 10 - Seasonal Availability of Grains and Legume Products

Grain/Legume	Availability for Purchase	
Products	Year round	Seasonal/Other
Oats		Oct-Nov
Barley	All year	Jun-Nov
Mixed Grains	All year	Jun-Sep
Soybeans	All year	Sep-Oct
Wheat	All year	Jul
Alfalfa	All year	
White Beans	All year	
Lavender Augustifolia	All year	
Field Rice	All year	
Rye		Jul

Table 11 - Estimated Bulk Quantities of Grains and Legumes Sold in 2009.

Grain/Legume Products	Estimated Quantities Sold
Oats	Not indicated
Barley	40 tons
Mixed Grains	Not indicated
Soybeans	30 tons, 60 tons, 66 tons
Wheat	13 tons
Alfalfa	120 tons
White Beans	Not indicated
Lavender Augustifolia	Less than 100kg
Field Rice	Not indicated
Rye	Not indicated

Table 12 - Format of Grains and Legumes sold by producers.

Product	Formats
Wheat	Truckload/prepared poultry feed
Barley	Prepared poultry feed
Soybeans	Bushels/truckloads
Alfalfa	Bales
Lavender Augustifolia	Tins/jars
Rye	Not indicated

Table 13 - Fruit Products Grown/Sold by Producers

Product	Frequency	%
Apples	5	16.1%
Strawberries	5	16.1%
Raspberries	4	12.9%
Plums	3	9.7%
Pears	3	9.7%
Sweet Cherries	2	6.5%
Peaches	2	6.5%
Saskatoon Berries	2	6.5%
Watermelons	2	6.5%
Sour Cherries	1	3.2%
Blueberries	1	3.2%
Black Currants	1	3.2%
Red Currants	1	3.2%
Elderberries	1	3.2%
Nectarines	1	3.2%
Grapes (For Wine)	1	3.2%

Table 14 - Seasonal Availability of Fruit Products

Fruit Products	Availability for purchase	
	Year round	Seasonal/other
Apples		Jul-Dec
Strawberries	Not indicated	
Raspberries		Summer/fall
Plums		Jul-Aug
Pears		
Sweet Cherries		June
Peaches		Jul-Aug
Saskatoon Berries	Not indicated	
Watermelons		Jul-Sep
Sour Cherries		July
Blueberries		Jul-Dec
Black Currants		June
Red Currants		Jul-Aug
Elderberries	Not indicated	
Nectarines	Not indicated	
Grapes (For Wine)	All year	

Table 15 - Estimated Bulk Quantities of Fruit Products Sold in 2009.

Product	Estimated Quantities Sold
Apples	100 tons, 300 tons, 200 bins
Strawberries	500 quarts
Raspberries	1 ton
Plums	Not indicated
Pears	5 tons, 10 tons
Sweet Cherries	5 tons
Peaches	Not indicated
Saskatoon Berries	Not indicated
Watermelons	Not indicated
Sour Cherries	Not indicated
Blueberries	7.5 tons
Black Currants, Red Currants, Elderberries	2.1 tons combined
Nectarines	Not indicated
Grapes (For Wine)	Not indicated

Table 16 - Format of Fruit Products Sold by Producers.

Product	Formats
Apples	Bushels/bins/10lb bags
Peaches	Not indicated
Sour Cherries	Packer bins
Raspberries	Pint/flat/lbs/bottles of wine
Strawberries	Quarts/flats
Plums	Basket/punnet/25lb bag
Blueberries	Pound
Wine	Bottles/tetra pac bags
Black Currants	Lbs/bottles of wine
Red Currants	Lbs/bottle of wine
Pears	Individual/bags
Plums	Basket/punnet/individual/25lb bag
Sweet Cherries	Basket/punnet
Watermelons	Individual
Saskatoon Berries	Not indicated
Elderberries	Lbs/bottles of wine
Nectarines	Individual/bags

Table 17 - Vegetable Products Grown/Sold by Producers

Product	Frequency	%
Tomatoes	11	35.5%
Corn	8	25.8%
Peppers	7	22.5%
Potatoes	6	19.4%
Pumpkins	6	19.4%
Green Beans	5	16.1%
Cucumbers	5	16.1%
Squash	3	9.7%
Onions	3	9.7%
Eggplant	3	9.7%
Broccoli	2	6.5%
Lettuce	2	6.5%
Green Peas	2	6.5%
Gourds	2	6.5%
Beets	2	6.5%
Sweet Potatoes	1	3.2%
Spinach	1	3.2%
Leeks	1	3.2%
Brussels Sprouts	1	3.2%
Garlic	1	3.2%
Cauliflower	1	3.2%
Cut flowers	1	3.2%

Table 18 - Seasonal Availability of Vegetable Products

Vegetable Products	Availability for Purchase	
	Year round	Seasonal
Tomatoes		May-Nov
Corn		Jul-Oct
Peppers		Aug-Oct
Potatoes		Jun-Dec
Pumpkins		Sep-Nov
Green Beans		Jun-Oct
Cucumbers		Jul-Sep
Squash		Sep-Nov
Onions		Apr-Oct
Eggplant		Not indicated
Broccoli		Not indicated
Lettuce		May-Nov
Green Peas		Jun-Sep
Gourds		Not indicated
Beets		Not indicated
Sweet potatoes		Sep-Apr
Spinach		May-Nov
Leeks		Sep-Oct
Brussels Sprouts		Sep-Oct
Garlic		Not indicated
Cauliflower		Not indicated
Cut Flowers		Not indicated

Table 19 - Estimated Bulk Quantities of Fruit Products Sold in 2009.

Product	Estimated Quantities Sold
Tomatoes	2.5 tons, 15 tons, 50 tons
Corn	6000 dozen
Peppers	1.5 tons, 80 tons
Potatoes	2 tons
Pumpkins	Not indicated
Green Beans	1500lbs
Cucumbers	500lbs, 20 tons
Squash	100 bins, 200 bins
Onions	800lbs
Eggplant	0.5 tons
Broccoli	Not indicated
Lettuce	5000 heads
Green Peas	Not indicated
Gourds	Not indicated
Beets	Not indicated
Sweet Potatoes	3 tons
Spinach	1 ton
Leeks	Not indicated
Brussels Sprouts	Not indicated
Garlic	Not indicated
Cauliflower	Not indicated
Cut Flowers	Not indicated

Table 20 - Format of Vegetable Products Sold by Producers

Product	Formats
Tomatoes	Per lb/quarts/5L/bushel/case/15lb flat
Corn	Dozen/single/bushels/truckloads/poultry feed
Peppers	Bushels/case/individual
Potatoes	Per lb/quarts/10lb basket/50lb bag
Pumpkins	Individual/bins
Green Beans	Per lb/quarts/pints/Kg
Cucumbers	Quarts/bushel/case/individual
Squash	Individual/bins/24 count box/18 count box
Eggplants	Individual/bushels
Onions	Per lb/quarts
Broccoli	Not indicated
Green Peas	Quarts
Lettuce	Heads
Gourds	Individual
Beets	Not indicated
Sweet Potatoes	40lb box
Spinach	Bags
Leeks	Not indicated
Brussels Sprouts	Not indicated
Garlic	Not indicated
Cauliflower	Not indicated
Cut Flowers	Not indicated

Table 21 - Meat/Dairy Raised/Sold by Producers

Meat/Dairy Products	Frequency	%
Dairy	2	6.5%
Beef	6	19.4%
Pork	2	6.5%
Lamb/Hogget/Mutton	1	3.2%
Chicken	2	6.5%
Turkeys	2	6.5%
Pheasant	0	0.0%
Bison	0	0.0%
Llama	0	0.0%
Fish	0	0.0%
Veal	1	3.2%
Eggs	1	3.2%
Rhea	1	3.2%
Horse	1	3.2%

Table 22 - Seasonal Availability of Meat/Dairy Products

Meat/Dairy Products	Year Round	Seasonal/Other
Dairy	All Year	
Beef	All Year	
Pork	All Year	
Lamb/Hogget/Mutton		Mar-Dec
Chicken	All Year	
Turkeys	All Year	Aug-Nov
Fish	Not Raised	
Veal	All Year	
Eggs	All Year	
Rhea	All Year	
Horse	All Year	Shipped

Table 23 - Bulk Quantity of Meat/Dairy Products Sold in 2009

Meat/Dairy Products	Bulk Quantity
Dairy	Not indicated
Beef	12000-60000 pounds
Pork	3000 pounds
Lamb/Hogget Mutton	35000
Chicken	20000-22500 pounds
Turkeys	2000-35000 pounds
Veal	3500-10500
Eggs	200,000 dozen
Rhea	Not indicated

Note: converted to pounds. If producer said 10-15 cows for e.g. The number inputted is 15.

Note: Veal 700lbs, Pork 250lbs, Cows 1000lbs, Turkeys 20lbs, Chicken 5lbs, Lamb unknown.

Missing: 5

Table 24 - Format of Meat/Dairy Products Sold by Producers

Product	Format
Dairy	
Beef	Entire Animal, 1/4 ,1/2 Sides, Pieces, Ground, Frozen
Pork	Frozen
Lamb/Hogget/Mutton	Entire Animal
Chicken	Entire Animal, Pieces
Turkeys	Entire Animal, Pieces
Fish	N/A
Veal	After 700 lbs frozen
Eggs	Dozen
Rhea	Pieces

Table 25 - Other Products Grown/Sold by Producers.

Product	Frequency	%
Herbs	2	6.45%
Preserves (i.e. Jams and Jellies)	4	12.90%
Honey	3	9.68%
Maple Syrup	1	3.23%
Wine	3	9.68%
Salsa	1	3.23%
Baked Goods	1	3.23%
Coleslaw	1	3.23%
Maple Treats	1	3.23%
Rhea Skin Products	1	3.23%
Bees in Orchard	1	3.23%

Table 26 - Seasonal Availability of Other Products

Other Products	Availability for Purchase	
	Year Round	Seasonal/Other
Herbs		May-Oct
Preserves (i.e. Jams and Jellies)	All year	April-Dec
Honey	All Year	Jun-Nov
Maple Syrup	All Year	
Wine	All Year	
Salsa		Aug-Oct
Baked Goods		May-Dec
Coleslaw		Jun-Aug
Maple Treats	All Year	
Rhea Skin Products	All Year	
Bees in Orchards	Not Indicated	

Table 27 - Estimated Bulk Quantities of Other Products Sold in 2009.

Other Products	Estimated Quantities Sold
Herbs	3500 lbs, 500 potted/500 bunches
Preserves (i.e. Jams and Jellies)	50 cases, 2 litres, 2000 bottles (jars)
Honey	50 cases, 2 litres, 2000 bottles (jars)
Maple Syrup	Not indicated
Wine	12000 litres
Salsa	25 cases
Baked Goods	50 lbs
Maple Treats	Not indicated
Rhea Products	Not indicated
Coleslaw	300 bags

Note: Some respondents were not sure, did not know or did not respond.

Table 28 - Format of Other Products Sold by Producers

Product	Format
Herbs	Cases, pots, fresh bunches
Preserves	Jars (250ml and other sizes)
Honey	Jars, 1/2 L or 1L
Maple Syrup	1/4, half, 1, and 4 litre
Wine	Bottles, tetra pac, box
Salsa	Jars
Baked Goods	Paper packaging
Maple Treats	by the unit or bag
Rhea Products	different packaging depending on product
Coleslaw	prepared bags

Table 29 - How Do You Sell Your Products?

How Do You Sell Your Products?	Frequency	%
Wholesale	27	87.1%
Retail	24	77.4%
Commodity Trader	4	12.9%
Commodity Pool	3	9.7%
Direct Sale	9	29.0%
Don't Sell	1	3.2%
Local Market (i.e. Farmers' Market)	14	45.2%
Other Farmers	7	22.6%
Co-op	1	3.2%
Other	4	12.9%

Table 30 - How Do You Sell Your Grains/Legumes Products?

How Do You Sell Your Grains/Legumes Products?	Direct Purchase		Retail		Commodity Trader		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	1	3.2%	2	6.5%	0	0.0%	0	0.0%
26-50	0	0.0%	0	0.0%	0	0.0%	0	0.0%
51-75	0	0.0%	0	0.0%	1	3.2%	0	0.0%
76-100	0	0.0%	4	12.9%	0	0.0%	4	12.9%

Table 31 - How Do You Sell Your Fruit Products?

How Do You Sell Your Fruits Products?	Direct Purchase		Retail		Commodity Trader		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	4	12.9%	4	12.9%	0	0.0%	2	6.5%
26-50	1	3.2%	6	19.4%	0	0.0%	1	3.2%
51-75	0	0.0%	4	12.9%	1	3.2%	0	0.0%
76-100	4	12.9%	6	19.4%	0	0.0%	9	29.0%

Table 32 - How Do You Sell Your Vegetable Products?

How Do You Sell Your Vegetables Products?	Direct Purchase		Retail		Commodity Trader		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	4	12.9%	5	16.1%	0	0.0%	3	9.7%
26-50	2	6.5%	4	12.9%	0	0.0%	2	6.5%
51-75	0	0.0%	0	0.0%	1	3.2%	0	0.0%
76-100	5	16.1%	5	16.1%	0	0.0%	10	32.3%

Table 33 - How Do You Sell Your Meat/Dairy Products?

How Do You Sell Your Meat/Dairy Products?	Direct Purchase		Retail		Commodity Trader		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	4	12.9%	4	12.9%	0	0.0%	1	3.2%
26-50	0	0.0%	5	16.1%	0	0.0%	2	6.5%
51-75	0	0.0%	0	0.0%	1	3.2%	2	6.5%
76-100	0	0.0%	4	12.9%	0	0.0%	13	41.9%

Table 34 - Table 34 - How Do You Sell Your Other Products?

How Do You Sell Your Other Products?

How Do You Sell Your Other Products?	Direct Purchase		Retail		Commodity Trader		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	0	0.0%	1	3.2%	0	0.0%	0	0.0%
26-50	0	0.0%	0	0.0%	0	0.0%	0	0.0%
51-75	0	0.0%	0	0.0%	0	0.0%	0	0.0%
76-100	2	6.5%	0	0.0%	0	0.0%	5	100.0%

Table 35 - Could You Estimate Your Gross Sales of Food in 2009?

Could You Estimate Your Gross Sales of Food in 2009?	Frequency	%
$0-$99, 999	8	38.1%
$100,000 - $249,999	5	23.8%
$250,000 - $499,999	4	19.0%
$500,000 - $749,999	2	9.5%
$750,000 - $999,999	0	0.0%
$1,000,000 - $2,499,999	1	4.8%
$2,500,000 - $4,999,999	1	4.8%
$5,000.000 +	0	0.0%
Total	21	100.0%

Missing Values = 10

Table 36 - Are You a Member of Any Associations?

Are You a Member of Any Associations?	Frequency	%
Yes	12	40.0%
No	18	60.0%
Total	30	100.0%

Missing Values = 1

Table 37 - Are there any specific government incentives (programs) that you use which encourage you to sell your food locally?

Are there any specific government incentives (programs) that you use which encourage you to sell your food locally	Frequency	%
Yes	3	15.0%
No	17	85.0%
Total	20	100.0%

Missing Values = 11

Table 38 - What Are the Different Types of Employees Your Organization Has?

What Are the Different Types of Employees Your Organization Has?	Frequency	%
Full-Time	11	35.5%
Part-Time	8	25.8%
Seasonal	13	41.9%
Other	2	6.5%

Table 39 - What is the Total Number of Employees Your Organization Has?

How Many Employees Does Your Organization Have?	Frequency	%
0-5	11	35.5%
6-10	4	12.9%
11+	9	29.0%
Total	24	77.4%

Missing Values = 7

Appendix B – Consumer Quantitative Results

Please note where respondents were given one option to answer question frequencies total 100%, otherwise no total is given.

Table 40 - Does Your Organization Purchase Local Food?

Does Your Organization Purchase Local Food?	Frequency	%
Yes	28	93.3%
No	2	6.7%
Total	30	100.0%

Missing Values = 3

Table 41 - What Year Did Your Organization Begin Purchasing Local Food?

What Year Did Your Organization Begin Purchasing Local Food?	Frequency	%
2001-2010	15	55.6%
1991-2000	5	18.5%
1981-1990	5	18.5%
1971-1980	0	0.0%
1961-1970	0	0.0%
1951-1960	2	7.4%
1941-1950	1	3.7%
Total	27	100.0%

Missing Values = 6

Table 42 - What Percentage of Your Purchases Could be Considered Local?

What Percentage of Your Purchases Could be Considered Local?	Frequency	%
0-25	7	33.3%
26-50	6	28.6%
51-75	3	14.3%
76-100	5	23.8%
Total	21	100.0%

Missing Values = 12

Table 43 - Which of the Following Best Describes Your Organization?

Which of the Following Best Describes Your Organization?	Frequency	%
Restaurant	18	58.1%
Hotel	1	3.2%
Bar/Tavern	1	3.2%
Child Care Center	3	9.7%
School Cafeteria	1	3.2%
Hospital Cafeteria	1	3.2%
University/College Cafeteria	1	3.2%
Factory Cafeteria	0	0.0%
Buying Club	0	0.0%
Child Care Center	0	0.0%
Total	26	83.9%

Missing Values = 7

Table 44 - What Year Did Your Organization Begin Operations (Year Established)?

What Year Did Your Organization Begin Operations (Year Established)?	Frequency	%
2001-2010	13	40.6%
1991-2000	7	21.9%
1981-1990	7	21.9%
1971-1980	1	3.1%
1961-1970	0	0.0%
1951-1960	3	9.4%
1941-1950	1	3.1%
Total	32	100.0%

Missing Values = 1

Table 45 - Grain/Legume products Purchased by Consumers

Grain/Legume Product	Frequency	%
Wheat	5	15.2%
Oats	2	6.1%
Barley	4	12.1%
Mixed Grains	2	6.1%
Soybeans	0	0.0%
Dry White Beans	3	9.1%
Alfalfa	1	3.0%
Kamut	1	3.0%
Smelt	1	3.0%
Rice	2	6.1%
Beans	0	0.0%
Sunflower Seeds	1	3.0%
Oatmeal	2	6.1%
Canned Beans	3	9.1%
Dried Beans (Not White)	1	3.0%

Table 46 - Seasons Grains/Legumes Purchased by Consumers

Grain/Legume Product	Year Round	Seasonal/Other
Wheat	All Year	
Oats	All Year	May-July
Barley	All Year	
Mixed Grains	All Year	
Soybeans	All Year	
Dry White Beans	All Year	
Alfalfa	Did Not Purchase	
Kamut	All Year	
Smelt	All Year	
Rice	All Year	
Beans	Did Not Purchase	
Sunflower Seeds	All Year	
Oatmeal	All Year	
Canned Beans	All Year	
Dried Beans (Not White)	All Year	

Table 47 - Format of Grain/Legume Products bought by Consumers.

Grain/Legume Product	Formats
Wheat	lb, package, bulk
Oats	lb
Barley	Bulk
Mixed Grains	lb
Soybeans	Not indicated
Dry White Beans	Package
Alfalfa	Not indicated
Kamut	lb
Smelt	lb
Rice	lb
Beans	Not indicated
Sunflower Seeds	Not indicated
Oatmeal	10kg bags,
Canned Beans	Canned
Dried Beans (Not White)	Not indicated

Table 48 - Estimated Bulk Quantities of Grain/Legume Products Bought in 2009.

Grain/Legume Product	Estimated Quantities Sold
Wheat	200lbs, 1000lbs/yr, 10lb/wk
Oats	100lbs
Barley	5kg/month
Mixed Grains	50lbs
Soybeans	Not indicated
Dry White Beans	1500lbs/yr, 10lb/wk
Alfalfa	Not indicated
Kamut	10lbs
Smelt	10lbs
Rice	10lbs
Beans	10lbs
Sunflower Seeds	Not indicated
Oatmeal	10kg bags
Canned Beans	Not indicated
Dried Beans (Not White)	Not often

Table 49 - Fruit Products Purchased by Consumers

Fruit Product	Frequency	%
Apples	22	66.7%
Peaches	9	27.3%
Sour Cherries	5	15.2%
Raspberries	12	36.4%
Strawberries	21	63.6%
Grapes	18	54.5%
Plums	3	9.1%
Blueberries	15	45.5%
Cranberries	6	18.2%
Bananas	6	18.2%
Kiwi	4	12.1%
Blackberries	2	6.1%
Watermelon	9	27.3%
Pineapples	2	6.1%
Cantaloupe	4	12.1%
Oranges	8	24.2%
Honeydew	1	3.0%
Muskmelon	2	6.1%
Pears	3	9.1%
Apricots	0	0.0%
Nectarines	0	0.0%
Rhubarb	1	3.0%
Lemons	3	9.1%
Grapefruit	1	3.0%
Mango	1	3.0%
Elderberries	0	0.0%
Limes	1	3.0%

Table 50 - Seasons Fruit Purchased by Consumer

Fruits Product	Year Rounds	Seasonal/Other
Apples	All Year	
Peaches	All Year	April-Nov
Sour Cherries	All Year	July
Raspberries	All Year	Did not indicate
Strawberries	All Year	
Grapes	All Year	
Plums	All Year	April-Nov
Blueberries	All Year	April-Nov
Cranberries	All Year	April-Nov
Bananas	All Year	April-Nov
Kiwi	All Year	Sept-May
Blackberries	All Year	
Watermelon	All Year	
Pineapples	All Year	
Cantaloupe	All Year	
Oranges	All Year	
Honeydew	Not indicated	
Muskmelon	All Year	
Pears	All Year	
Apricots	All Year	
Nectarines	All Year	
Rhubarb	All Year	
Lemons	All Year	
Grapefruit	All Year	
Mango	All Year	
Elderberries	Not indicated	
Melon	All Year	
Limes	All Year	

Table 51 - Format of Fruit Products bought by Consumers.

Fruit Product	Formats
Apples	Loose, case of 72, sauce, box of 36, fresh, bushel, bags
Peaches	Fresh when in season, canned, quart, box
Sour Cherries	12kg case frozen, quart
Raspberries	10kg case frozen, fresh, 4 quart, 6oz
Strawberries	Packaged, flat, 10kg, case, frozen,quart, box
Grapes	Packaged, fresh, lbs, bag
Plums	Case of 6 100oz cans, bags
Blueberries	Packaged, 10kg case frozen, fresh, flats, 6 quart, case
Cranberries	Sauce, dried
Bananas	Bushel, fresh
Kiwi	Loose, bags
Blackberries	Packaged
Watermelon	Loose, indiv
Pineapples	Loose, canned
Cantaloupe	Loose, indiv
Oranges	Case of 72, boxes of 36, case of Orange Juice
Honeydew	Indiv
Muskmelon	Indiv
Pears	Fresh, cases of 6 x 100oz cans
Apricots	Fresh, canned
Nectarines	Fresh
Rhubarb	Fresh, frozen
Lemons	Case of 125, case
Grapefruit	Not indicated
Mango	Not indicated
Elderberries	Not indicated
Limes	bag

Table 52 - Estimated Bulk Quantities of Fruit Products Bought in 2009.

Fruit Product	Estimated Quantities Sold
Apples	35 lb bags/wk, 3-5 bushels, 5lb/month, 50 bushels, 60kg/wk, 100lbs, 30 bushel/yr, 300 lbs, 50, 20lb/month
Peaches	20lb/yr
Sour Cherries	5-10lbs/yr, 6 cases/yr
Raspberries	50pack, 12-18 quarts, 10kg/month, 20lb, 1 bushel, 100lb
Strawberries	30pkgs, 300flats, 300 quarts, 30-40lbs, 20lbs, 5lbs/wk, 10kg/month, 20lb, bushel, 50lb, 100lbs, 20lb/month
Grapes	20 bunches, 4lb/month, 4kg/wk, not often, 20lbs, 6 quarts/wk, 50lb, 100lbs
Plums	10 cases/yr
Blueberries	70 packages-frozen, 10kg/month, 20lb
Cranberries	Dried-20lb, fresh-40-50 lb
Bananas	200,30/wk, occasional, 25lb/wk
Kiwi	120
Blackberries	50kg
Watermelon	25
Pineapples	25
Cantaloupe	20, 25lb
Oranges	2 to 3 5lb bags/wk, 1 case/month, box/month, 100lb
Honeydew	Not indicated
Muskmelon	Not indicated
Pears	2-3 bushels, 2 case/month
Apricots	Not indicated
Nectarines	5lb/month
Rhubarb	1 case frozen/month
Lemons	35 cases, 100lbs, case, 12-14 cases
Grapefruit	Not indicated
Mango	Not indicated
Elderberries	Not indicated
Limes	Case

Table 53 - Vegetable Products Purchased by Consumers

Vegetable Product	Frequency	%
Corn	14	42.4%
Tomatoes	29	87.9%
Green Peas	14	42.4%
Green Beans	15	45.5%
Onions	31	93.9%
Potatoes	25	75.8%
Peppers	24	72.7%
Eggplant	3	9.1%
Asparagus	11	33.3%
Pumpkins	7	21.2%
Cucumbers	21	63.6%
Garlic	11	33.3%
Mushrooms	5	15.2%
Squashes	5	15.2%
Romaine Lettuce	3	9.1%
Green Onions	2	6.1%
Zucchini	2	6.1%
Bean Sprouts	2	6.1%
Celery	5	15.2%
Carrots	10	30.3%
Broccoli	4	12.1%
Cauliflower	5	15.2%
Yellow Beans	1	3.0%
Lettuce	10	30.3%
Acorn Squash	1	3.0%
Waxed Beans	1	3.0%
Parsnip	2	6.1%
Brussels Sprouts	3	9.1%
Lemons	1	3.0%
Cabbage	5	15.2%
Spinach	1	3.0%
Fennel	1	3.0%
Bamboo	1	3.0%
Chinese Greens	1	3.0%
Radishes	3	9.1%
Lima Beans	0	0.0%
Turnip	0	0.0%

Table 54 - Seasons Consumers Purchase Vegetables

Vegetable Product	Year Round	Seasonal/Other
Corn	All Year	April-Nov
Tomatoes	All Year	
Green Peas	All Year	April-Nov
Green Beans	All Year	April-Nov
Onions	All Year	
Potatoes	All Year	
Peppers	All Year	
Eggplant	All Year	
Asparagus	All Year	April-Nov
Pumpkins	All Year	Not indicated
Cucumbers	All Year	
Garlic	All Year	April-Nov
Mushrooms	All Year	
Squashes	All Year	April-Nov
Romaine Lettuce	All Year	May-July
Green Onions	All Year	
Zucchini	All Year	
Bean Sprouts	All Year	
Celery	All Year	Sept-May
Carrots	All Year	Sept-May
Broccoli	All Year	
Cauliflower	All Year	
Yellow Beans	Did Not Purchase	
Lettuce	All Year	May-July
Acorn	All Year	
Waxed Beans	All Year	
Parsnip	All Year	
Brussels Sprouts	All Year	
Lemons	All Year	
Cabbage	All Year	April-Nov
Spinach	All Year	April-Nov
Fennel	Not Indicated	April-Nov
Bamboo	All Year	
Chinese Greens	All Year	
Radishes	All Year	Sept-May
Lima Beans	All Year	
Turnip	All Year	

Table 55 - Format of Vegetable Products bought by Consumers.

Vegetable Product	Formats
Corn	Case, Frozen, Bushel, Box
Tomatoes	Packaged, Bushel, lbs, fresh, box,cases, 1lb, separate
Green Peas	pint, frozen,bushel, pack
Green Beans	pint, frozen, box, lb, case
Onions	box,dozen,lbs,fresh, bushel,box, bags, 50lb bags, cases
Potatoes	Cases of 2kg bags-frozen, 40lb bags fresh,boxes, 50lb bags, fresh
Peppers	Cases of 2kg bags-frozen, fresh, bushel, box, cases. Pack, the pound
Eggplant	box
Asparagus	lb
Pumpkins	Not indicated
Cucumbers	Fresh, indiv, bulk, single bag, cases
Garlic	Fresh, box, pound, pack
Other	cases, fresh, bag, box, case, lb, indiv
Mushrooms	Fresh, Box
Squash	Whole, case
Romaine Lettuce	Case, lb,indiv, large bag
Green Onions	Not indicated
Zucchini	Case of 6
Bean Sprouts	Case of 6 x 2kg
Celery	Case,pound,indiv
Carrots	Case, bag
Broccoli	Case,indiv
Cauliflower	Indiv, case
Yellow Beans	Not indicated
Lettuce	Case,lb,head
Acorn Squash	Whole, case
Waxed Beans	case
Parsnip	Case
Brussels Sprouts	Case
Cabbage	Indiv, head
Spinach	Not indicated
Fennel	indiv
Bamboo	Box
Chinese Greens	Box
Radishes	Bag
Lima Beans	case
Turnip	Not indicated

Table 56 - Estimated Bulk Quantities of Vegetable Products Bought in 2009.

Vegetable Product	Estimated Quantities Sold
Corn	12kg/month frozen, 2 case/month, 100lb, 70, 3-10 kg/month,
Tomatoes	25 packages, 50lbs, 6 per week, 6kg/wk, 20kg/wk, 2 cases, 10lbs/wk,15lbs/wk, 3000 lbs, 500lbs, 25kg/wk, 40lb/month, 20lbs, 40lbs
Green Peas	72kg, 52 cases, 50lbs, 120kg
Green Beans	144 kg frozen,24 cases, 50lbs, 300lbs, 60kg
Onions	25 dozen, 12lb/m, 6lb/m, 60lb, 120lb,240lb,12cases,480lb,10lb,2400lb,2000lb, 170kg,240lb, 6bags, 30lb
Potatoes	20lb/wk, 300lb, 200lb/wk, 2 cases, 17bags, 300lb, 400lb/wk, 10,000lb, 6000lb, 300lb/m, 150lb/wk, 600bags
Peppers	15, 6/month, 1or2/wk, 7or8lb/month, case/month, 2/wk, 40lb, 1000lb, 50lbs, 2kg/m, 10lb
Eggplant	Not indicated
Asparagus	15 bunches,300lb, 2 cases, 50lb
Pumpkins	10lb
Cucumbers	5/m, 20 -30 lbs,1 per week (seedless), 2 kg /week,12 per week,5 lbs/week,500 lb,10 lbs,15/m, 10lb/m
Garlic	Not many, 20lb, 1kg/m, 1lb/m
Alfalfa	Not indicated
Mushrooms	15lb
Squash	20lb, 1case/wk
Green Onions	500lb
Zucchini	2 cases/month frozen, 5lb/wk
Bean Sprouts	Not indicated
Celery	50lb, 10
Carrots	12kg/m, 1 case/wk, 500lb, 10kg/m, 20lb, 15 bags
Broccoli	8lb/m, 12kg/wk frozen, 800lb
Cauliflower	8lb/m,12kg/wk frozen, 800lb
Yellow Beans	1 case/m
Lettuce	20kg/wk, 14 heads/wk, 12, 1000 lbs, 24
Waxed Beans	1 case/m
Parsnip	1 case/m
Brussels Sprouts	2 cases/m
Lemons	4/wk
Cabbage	24
Spinach	Not indicated
Fennel	Not indicated
Bamboo	Not indicated
Chinese Greens	Not indicated
Radishes	25lb, 1kg/m
Lima Beans	Not indicated
Turnip	Not indicated

Table 57 - Meat/Dairy Products Purchased by Consumers

Meat/Dairy Product	Frequency	%
Dairy	22	66.7%
Beef	22	66.7%
Pork	24	72.7%
Lamb/Hogget/Mutton	5	15.2%
Chicken	23	69.7%
Turkeys	16	48.5%
Pheasant	0	0.0%
Bison	1	3.0%
Llama	0	0.0%
Fish	18	54.5%
Cheese	2	6.1%
Milk	5	15.2%
Yogurt	2	6.1%
Eggs	3	9.1%
Sour Cream	2	6.1%
Shrimp	1	3.0%

Table 58 - Meat/Dairy Seasons Purchased by Consumers

Meat/Dairy Product	Year Round	Seasonal/Other
Dairy	All Year	
Beef	All Year	
Pork	All Year	
Lamb/Hogget/Mutton	All Year	
Chicken	All Year	
Turkeys	All Year	
Bison	All Year	
Fish	All Year	
Cheese	All Year	
Milk	All Year	
Yogurt	All Year	
Eggs	All Year	
Sour Cream	All Year	
Shrimp	All Year	

Table 59 - Formats of Meat/Dairy Products Purchased by Consumers.

Meat/Dairy Product	Formats
Dairy	200ml, 500 ml, carton - fresh from dairy, Bagged ,litres, creamettes, cups, bags, pack, carton, box
Beef	10 kg cases, fresh, bag, frozen, lb, cases, ground , ground box, pieces
Pork	packaged, per pound, kg, fresh, case, ground, box
Lamb/Hogget/Mutton	kg
Chicken	frozen, bag, fresh, wings, box, case, legs, tenders, cut
Turkeys	frozen, fresh, bag, box, case, burgers, sausages, whole breasts
Fish	lb, kg, canned, fresh, frozen, box, case
Eggs	dozen, bags
Shrimp	bags

Table 60 - Estimated Bulk Quantities of Meat/Dairy Products Purchased in 2009.

Meat/Dairy Product	Estimated Quantities Sold
Dairy	50l, 40l/wk, 500l,250l,10kg/m,100l/m, 40l,40kg, 240 milk cartons, 36bags
Beef	150lb, 100-130 4oz burgers per week, 10lb ground beef per week,100 lb,250 lbs/week, 10000lb, 2000 lb,25 lb/month,20 lb/month,60 kg
Pork	400 pounds,50 lbs, 100lb,30lbs/wk, 5000lb, 5lb/m, 20lb/m, 40kg
Lamb/Hogget/Mutton	Not indicated
Chicken	1000 lbs, 50 4oz chicken burgers per week, 5lb sliced chicken for wraps per week,60 lb,40 lbs/week,3000lb,500 lb,20kg/month,20 kg/month,120 kg
Turkeys	270 kg, 40 lb,40 lbs/week,1000lb, 40lb, 50lbs/month,20 kg/month
Fish	95boxes,40lb,30lb/wk, 50lb, 50lb/m, 20kg/m,1800lbs
Cheese	Not indicated
Eggs	6 cases
Shrimp	Not indicated

Table 61 - Other Products Purchased by Consumers

Other Products	Frequency	%
Herbs	9	27.3%
Preserves (i.e. Jams and Jellies)	9	27.3%
Honey	13	39.4%
Maple Syrup	9	27.3%
Wine	7	21.2%
Spices	1	3.03%
Baked Goods	4	12.12%
Tea/Coffee	1	3.03%
Beer	2	6.06%

Table 62 - Seasons Other Products are Purchased by Consumers

Other Products	Year Round	Seasonal/Other
Herbs	All Year	Not indicated
Preserves (i.e. Jams and Jellies)	All Year	
Honey	All Year	Not indicated
Maple Syrup	All Year	
Wine	All Year	Not indicated
Spices	All Year	
Baked Goods	All Year	
Tea/Coffee	All Year	
Beer	All Year	

Table 63 - Format of Other Products bought by Consumers.

Other Products	Formats
Herbs	Jar, packaged, bunches, potted
Preserves (i.e. Jams and Jellies)	Jars, single containers
Honey	Bottled, 500ml, 1L, squeeze bottles, pack
Maple Syrup	Jugs, 1L, 4L, pack
Wine	Bottles,
Spices	Not indicated
Baked goods	Loaves, rolls,buns, dozen, ½ dozen
Tea/Coffee	Boxes, packs
Beer	case

Table 64 - Estimated Bulk Quantities of Other Products Bought in 2009.

Other Product	Estimated Quantities Sold
Herbs	3potted plants, 5lbs, 20lbs, 10lbs
Preserves (i.e. Jams and Jellies)	40jars, 10jars, 10lb/m, 50lb
Honey	10bottles, 10L, 12kg/month, 10lb
Maple Syrup	5L, 50L, 12L, 2kg/month
Wine	2000L, 5L/month, 150 bottles
Baked Goods	200 loaves bread/month, muffins (1box/month), bagels 2boxes/month
Tea/Coffee	4 cases, 4 boxes
Beer	4 cases/wk

Table 65 - How Do You Purchase Your Food Products?

How Do You Purchase Your Food Products?	Frequency	%
Direct Purchase	15	45.5%
Retail	19	57.6%
Wholesale	25	75.8%
Commodity Trader	1	3.0%

Table 66 - How Do You Buy Your Grain/Legume Products?

How Do You Buy Your Grain/Legume Products?	Direct Purchase		Retail		Direct Sale		Farmer's Market		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	0	0.0%	1	3.0%	0	0.0%	0	0.0%	1	3.0%
26-50	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
51-75	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	3.0%
76-100	2	6.1%	0	0.0%	0	0.0%	0	0.0%	4	12.1%

Table 67 - How Do You Buy Your Fruit Products?

How Do You Buy Your Fruit Products?	Direct Purchase		Retail		Commodity Trader		Wholesale		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	0	0.0%	3	9.1%	0	0.0%	1	3.0%	0	0.0%
26-50	1	3.0%	1	3.0%	1	3.0%	1	3.0%	0	0.0%
51-75	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
76-100	1	3.0%	0	0.0%	0	0.0%	1	3.0%	2	6.1%

Table 68 - How Do You Buy Your Vegetable Products?

How Do You Buy Your Vegetable Products?	Direct Purchase		Retail		Commodity Trader		Wholesale		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	3	9.1%	7	21.2%	1	3.0%	4	12.1%	2	6.1%
26-50	2	6.1%	1	3.0%	1	3.0%	1	3.0%	1	3.0%
51-75	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
76-100	5	15.2%	1	3.0%	1	3.0%	2	6.1%	0	0.0%

Table 69 - How Do You Buy Your Meat/Dairy Products?

How Do You Buy Your Meat/Dairy Products?	Direct Purchase		Retail		Commodity Trader		Wholesale		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	1	3.0%	0	0.0%	2	6.1%	0	0.0%	2	6.1%
26-50	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
51-75	1	3.0%	0	0.0%	0	0.0%	1	3.0%	0	0.0%
76-100	2	6.1%	0	0.0%	0	0.0%	0	0.0%	3	9.1%

Table 70 - How Do You Buy Your Other Products?

How Do You Buy Your Other Products?	Direct Purchase		Retail		Commodity Trader		Wholesale		Wholesale	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
0-25	2	6.1%	0	0.0%	0	0.0%	1	3.0%	2	6.1%
26-50	1	3.0%	1	3.0%	0	0.0%	0	0.0%	0	0.0%
51-75	1	3.0%	1	3.0%	0	0.0%	0	0.0%	0	0.0%
76-100	0	0.0%	7	21.2%	0	0.0%	0	0.0%	1	3.0%

Table 71 - Could You Estimate Your Gross Sales of Food in 2009?

Could You Estimate Your Gross Sales of Food in 2009?	Frequency	%
$0-$99, 999	1	4.8%
$100,000 - $249,999	6	28.6%
$250,000 - $499,999	11	52.4%
$500,000 - $749,999	2	9.5%
$750,000 - $999,999	1	4.8%
$1,000,000 - $2,499,999	0	0.0%
$2,500,000 - $4,999,999	0	0.0%
$5,000.000 +	0	0.0%
Total	21	100.0%

Missing Values = 12

Table 72 - Are You a Member of Any Associations?

Are You a Member of Any Associations?	Frequency	%
Yes	20	83.3%
No	4	16.7%
Total	24	100.0%

Missing Values = 9

Table 73 - Are there any specific government incentives (programs) that you use which encourage you to sell your food locally?

Are there any specific government incentives (programs) that you use which encourage you to sell your food locally	Frequency	%
Yes	0	0.0%
No	29	100.0%
Total	29	100.0%

Missing Values = 4

Table 74 - What Are the Different Types of Employees Your Organization Has?

What Are the Different Types of Employees Your Organization Has?	Frequency	%
Full-Time	18	54.5%
Part-Time	21	63.6%
Seasonal	7	21.2%
Other	0	0.0%

Table 75 - How Many Employees Does Your Organization Have?

How Many Organizations Does Your Organization Have?	Frequency	%
0-5	12	36.4%
6-10	7	21.2%
11+	11	33.3%
Total	30	90.9%

Missing Values = 3