

Food and Agriculture Market Research for Algoma, Manitoulin and Sudbury

Discussion Paper

Thunder Bay Food & Agriculture Market Study

In early 2016 a partnership of organizations in Thunder Bay embarked on conducting a Food & Agriculture Market Study (FAMS) that would gather information on the state of the market for locally-produced or wild-harvested foods in the Thunder Bay area. The market study would support a goal of the Thunder Bay and Area Food Strategy to “support the creation of a food supply chain that links local production to processing, distribution and marketing, consumption and waste management in ways that sustain the local economy, minimize environmental impact and improve people’s access to healthy food”.

The partnership included, the Thunder Bay & Area Food Strategy, Thunder Bay Federation of Agriculture, North Superior Workforce Planning Board, Regional Food Distribution Association, Community Economic Development Commission, Northwestern Ontario Innovation Centre, Thunder Bay Ventures, Thunder Bay Chamber of Commerce, and Northern Policy Institute.

Since they have embarked on this study, the partnership recently secured funding through Growing Forward 2 to coordinate the study with the Thunder Bay Food Strategy, Harry Cummings & Associates (HCA) and students from Lakehead University.

Algoma – Manitoulin – Sudbury Agri-Food Market Research and Development

In 2016, a group of organizations (the Rural Agri-Innovation Network, Community Development Corporation of SSM & Area, Local Organic Food Co-ops Network and Greater Sudbury Development Corporation) began exploring how a similar FAMS initiative could take place in Northeastern Ontario communities. The organizations started to explore the market conditions within each local District of familiarity to the organizations, Algoma, Manitoulin and Greater Sudbury. This paper will discuss these three Districts and the state of local/regional food marketing within each District.

Algoma

Algoma has had several different market research reports that investigate the market demands for local food and assess the economic impact of the sector (see Appendix 1). Previous research efforts have focused on meat processing (beef, lamb and goat), consumer and retailer preferences for local food. These studies were beneficial for producers to analyze risks and rewards in starting or expanding their businesses. Penokean Hills Farms is one such business that developed through market research reports.

In 2009, Harry Cummings & Associates (2009) conducted an economic impact assessment that analyzed 2006 Census information to assess the impact of the sector. There has been a significant change in the sector since 2006 with an increasing number of new farms, three new farmers’ markets, an increase in farm infrastructure (tile drainage), and a changing diversity in crops and new products. There have also been some significant strides with an increase in greenhouse structures, a new produce auction and an interest in developing further production of specialty crops and value-added products.

There has also been a growing consumer awareness and appreciation for local food. Algoma Food Network has released the Buy Algoma Buy Fresh local producers directory four times since 2009 that has

raised consumer awareness in purchasing local food. Local procurement has increased with institutions, restaurants and corporate customers, such as Dana Hospitality and Quattro. Farmers' markets have grown in Algoma with the new Mill Market, an expansion of Johnson Farmers' Market and a new farmers' market in Prince Township.

Further market research could be a benefit for Algoma producers and businesses that are considering start-ups or expansions in vegetable production, specialty crops, non-timber forest products, fish, pork, rabbits, poultry, eggs and other value-added products (flour, honey, preserves). Assessing the market would also assist producers that are transitioning to adhere more closely to specific food safety or regulatory standards such as Canada GAP or Certified Organic.

Manitoulin Island

On Manitoulin Island, beef production continues to drive the agriculture sector. Selling beef into the regional market has been challenging as the current abattoir (Manitoulin Island Community Abattoir - MICA) struggles to generate enough volume for viability. Although the not-for-profit board receives support from the LAMBAC Community Futures Development Corporation, the abattoir is continuing to face difficulty. There is a need to open a larger market (demand) for Manitoulin meat as well as promote the viability of selling meat into this market (supply) rather than shipping whole animals off-island. The MICA would like to explore exporting Manitoulin meat (and other northern products) to the St. Lawrence Market in Toronto.

Food and Farm Culinary Tourism was first explored in 2012 as part of the Manitoulin Cultural Planning project spearheaded by Mary Nelder at LAMBAC. The focus then was on artisanal food production. Recently a workshop run by the Culinary Tourism Association was well attended and there could be momentum if LAMBAC is again approached to spearhead this initiative. Manitoulin has a growing number of artisanal producers and craft breweries and there is an awareness by local restaurants of the importance of carrying and promoting local food.

Most towns and many of the First Nation's have a summer farmer's market. These are not well promoted and there are complaints that apart from Gore Bay there are more crafts sold at these markets than food. The Island Jar in Little Current and Island Goods in Gore Bay both carry as much local food as possible including a broader version of local i.e. Ontario. The Island Jar is an established and successful business. So, there is a demand for this from the local population.

Noojowin Teg Health Centre (AOK) and Debajumajig Theatre Group (Wiky/Manitowaning) are the centres of food security initiatives. Both groups work with First Nations and non-FN on food security including community gardens, the Good Food Box and general food education. Nooj just received a three year OTF Grow Grant to start and grow 7 community gardens on Manitoulin, build a greenhouse, expand the Good Food Box and do food and gardening education.

Additional investigation is needed on what other First Nations on the island are prioritizing for agricultural development. Fisheries and aquaculture has been another driving force on the Island with examples like Meeker's and Buzwah Fisheries.

Sudbury

Over the last 10 years the local food and agriculture landscape in Sudbury had changed significant, and largely because of the work of Eat Local Sudbury Co-operative (ELS). Eat Local started in 2007 and since that time has provided system development through marketing, training, advocacy, and partnerships in sector development.

As part of their work, in seeking to improve the production and consumption of local foods in the region, they completed a number of reports and plans to support the expansion, most importantly which was an a local supply and demand assessment based on interviews conducted with farmers from across the North East. This assessment identified opportunities and challenges in the system. This report was a research report to support the multi-business plans which were created to increase sales over the next 5 years.

Farmers markets in the Sudbury area have either started up or expanded with the increased demand for local foods. This includes markets in the new markets in Valley East and Espanola, as well as the 2017 expanded downtown market to include Thursday afternoons.

The Sudbury Food Policy Council was established in 2014 to bring together community partners to develop food system solutions through advocacy and policy development. A result of their work has been the inclusion of a Food Section of the 2017 Official Plan (to be approved by council), which will allow for program and policy change from the municipal level to improve conditions for food to improve.

This council is presently embarking on the development of a food strategy for the city of Sudbury. In partnership with many community partners, the Sudbury Social Planning Council is fostering the development of a community urban farm in the Flour Mill area. The farm would serve as a community space for growing as well as training for youth.

College Boreal, the only francophone college in Northern Ontario started an Agricultural Technicians program in 2016 to train a new generation of skilled professionals for the agricultural sector.

Shared Interest across the Regions

Through the discussion the following themes have been apparent for further exploration

- Labour market demand for trained agricultural workers, as well as business development opportunities for young people (including students at College Boreal's agriculture program)
- Understanding more thoroughly on the state of food in the region, which would drive policy development and programming to improve the sector
- Local market demand for niche products and adherence to Canada GAP
- Identification of opportunities and collaborations in local food sales
- Increased awareness of local food producers in the region

Appendix 1:

Fernandez, Mayhew, and Tarantini (2006). *“Buy Local Beef” Marketing Study for the Algoma Cooperative Livestock Sales (ACLS)*. Algoma University College.

Harry Cummings & Associates (2009). *Algoma-Manitoulin Agricultural Economic Sector Profile*.

Broad and Lawrence (2009-10). *Penokean Hills Farms Market Research, Business Analysis & Strategic Plan*. Algoma University.

Thompson, D. (2012) *Expanding Locally Sourced Beef in Northern Ontario through the Co-operative Model*. Cape Breton University.

Cameron, Piazza and Thompson (2012). *Locally Grown Food for the Northern Urban Marketplace Market Research Study*. Algoma University.

Causley and Thompson (2012). *Exploring Marketing Opportunities for Lamb and Chevon in Algoma District*. NORDIK Institute.

Heeney and Thompson (2013). *Algoma Consumer Research Study on Local Food*. Rural Agri-Innovation Network.

O’Reilly and Thompson (2016). *Algoma Hops Production Opportunities*. Rural Agri-Innovation Network

Appendix 2:

Gervais (2015) *Buyer Interviews Report*. Eat Local Sudbury

Lewington, Muckle, and Thoma (2014) *Farming to Farmer Interviews: A report of the findings from the 2014 Food Hub Interviews*. Eat Local Sudbury

Collins Barrow, Sudbury-Nipissing LLP (2015) *Eat Local Sudbury Food Hub Business Plan*. Eat Local Sudbury