RAIN
RURAL AGRI-INNOVATION NETWORK

North Central Ontario Food and Agricultural Market Study

MANITOULIN REPORT

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Bruce Mines Agricultural Society

Mill Market

Mississaugi First Nation

Wikwemikong Development Commission

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Executive Summary

Introduction

This report presents the findings of the North Central Ontario Food and Agricultural Market Study (NFAMS) for Manitoulin District.

The NFAMS study was initiated in June 2018 by the Rural Agri-Innovation Network (RAIN), a division of the Sault Ste. Marie Innovation Centre (SSMIC), and advanced by a broad group of organizations with interests in supporting agri-food development through market research in the Algoma, Manitoulin, and Sudbury area.

The study was designed to examine the local food economy for the purpose of gaining a better understanding of the regional market with a special focus on food demand. The study consisted of two major research elements: key informant interviews with local businesses and organizations representing four types of food demand (food processing, food retail, food services, and food programs) and focus group discussions with local producers and related interest groups.

Summary Findings

The agricultural land base in Manitoulin District supports a diversity of food production activities including field crops (e.g. grains, oilseeds, potatoes, vegetables), fruits and berries (e.g. apples, strawberries, raspberries) and greenhouse production as well as mushrooms and maple syrup production. The region also supports a diversity of livestock production (e.g. beef, dairy, hog, sheep, goats) as well as poultry and egg production, and beekeeping. Beyond the cultivated lands, the natural environment supports wild game hunting and fishing activities as well as local harvesting activities (e.g. wild plants, mushrooms, berries, etc.) that contribute to the local food system. Manitoulin also features a substantial aquaculture sector.

The flow (i.e. marketing) of locally grown food through local businesses and organizations in Manitoulin District is not well understood. A key objective of this study was to engage with four areas of food demand in the region to expand our knowledge and awareness of how much interest businesses and organizations have in locally grown food, how they define ‘locally grown’ food, and the key factors that influence their decisions to source locally grown / harvested foods. Specifically, the four areas of food demand consist of:

1. local food processors (e.g. meat, fish, dairy, egg, grains, fruit/vegetables, other processing including breweries)
2. local food retailers (e.g. grocers, convenience stores, food wholesalers / distributors)
3. local food services (e.g. restaurants, hotel and accommodation establishments, caterers and banquet halls, institutions, day care centres, hospitals, assisted living facilities, etc.)
4. local food programs (e.g. food banks, good food box programs, student nutrition programs, meal delivery service programs, community kitchens, etc.)

It is important to note that the study results are from a relatively small sample of businesses / organizations (72 in Algoma District, 51 in Manitoulin / LaCoche, 61 in Greater Sudbury / Sudbury District / West Nipissing) and as such the findings cannot be generalized across the broader population of businesses / organizations in the region. However, the findings provide valuable insights on the food procurement activities/decisions of local businesses and organizations and represent important input to the planning and decision-making process for

various local stakeholders that are looking to support/expand the local agri-food economy (e.g. farmers, food processors, food retailers, food services, food programs, lending institutions, economic development officials and policy makers, Indigenous communities and organizations, etc.).

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed. The majority of the businesses / organizations in Manitoulin District (almost 60%) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group more than half feel that 'locally grown' refers to food produced specifically in Manitoulin District. It's worth noting that almost 40% of the businesses / organizations hold an expanded definition of local food that encompasses areas of southern Ontario and/or other areas of Canada and this proportion is higher among businesses located in large urban centres (i.e. Sault Ste. Marie / Greater Sudbury).

The study revealed that most businesses / organizations have a high level of interest in sourcing locally grown foods (i.e. from the Algoma / Manitoulin / Sudbury region) but their level of awareness of local food options/availability is generally not as strong (i.e. some businesses / organizations acknowledge that they have limited knowledge of what's being produced locally).

Businesses and organizations were asked to identify the ways in which they typically stay informed about local food availability and options. The most common means by which businesses and organizations stay informed about local food options is through direct communication with growers and harvesters. Approximately half of all the representatives interviewed in each of the three districts identified direct communication as a key approach for staying informed about local food options.

Manitoulin based businesses / organizations use a variety of ways to stay informed about local food availability and options. Direct communication with producers is by far the most common and most preferred approach used and this finding is consistent across all four areas of food demand. Other common methods used for staying informed about local food options include communicating with food distributors, attending farmers' markets, and subscribing to relevant newsletters / social media.

The majority of Manitoulin based businesses / organizations (70%+) are currently sourcing some amount of locally grown foods from the Algoma / Manitoulin / Sudbury area and many of the businesses / organizations that are not sourcing local at this time are interested in doing so in the future. There was particularly strong interest from food processors and food service businesses / organizations and food programs in sourcing locally grown foods at a future date.

With respect to the key factors that motivate Manitoulin based businesses / organizations to source locally grown foods, one value stood out well above all the others and that's the recognition that buying local supports the local economy. This finding is consistent across all four areas of food demand. The next highest-ranking value is that locally grown food is higher quality and this attribute is especially valued by businesses / organizations in the food retail and food service sectors. Another key importance that businesses / organizations associate with locally grown food is that it's something their customers increasingly want / demand and they are using 'locally grown food' in their promotions to appeal to customers and distinguish their business.

With respect to the key factors that discourage Manitoulin based businesses / organizations from sourcing locally grown foods, one concern stood out well above all the others and that's

the view that locally grown foods are more expensive than non-local options. This finding is particularly relevant to businesses / organizations in the food processing, food retail and food service sectors. Given that most food programs typically rely on food donations or discounted foods, cost wasn't so much a concern as was storage space (i.e. food programs have limited capacity to handle large volume donations – especially for food requiring refrigeration or freezing). Another high-ranking concern that businesses / organizations in the food processing, food retail and food service sectors have is that local producers are unable to provide the volumes they require which is closely related to other concerns including seasonality issues and general concerns about reliability (e.g. producers are unable to consistently deliver on the required volume).

A key interest of the NFAMS study was to examine the amount of locally grown / harvested food products being purchased by businesses and organizations and to identify areas for potential growth (i.e. the amount of foods being sourced from outside the Algoma / Manitoulin / Sudbury region). The tabulated findings for the Manitoulin based businesses / organizations show that there are a number of food commodities where there are significant local food deficits that could potentially be addressed by local producers / processors. The following table provides an overview of some of the larger local food deficits that were identified through the study.[1]

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Potatoes	over 190,000 kgs
Carrots	over 3,900 kgs
Cucumbers	over 2,800 kgs
Sweet corn	over 2,600 cobs
Onions	over 2,000 kgs
Lettuce	over 2,000 kgs
Cauliflower	over 1,100 kgs
Tomatoes	over 1,000 kgs
Mixed greens	over 400 kgs
Apples	over 500 kgs
Strawberries	over 300 kgs
Raspberries	over 200 kgs
Blueberries	over 150 kgs
Malt barley	over 15,000 kgs

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Beef – various cuts	over 700 kgs
Beef – hamburger	over 1,600 kgs
Pork – various cuts	over 600 kgs
Pork – ground/sausage	over 1,000 kgs
Chicken – breast	over 300 kgs
Chicken – whole bird	over 700 birds
Eggs, whole shell	over 15,000 dozen
Eggs, hard boiled	over 500 dozen
Eggs, liquid	over 700 kgs
Milk, fluid	over 5,000 litres
Cheese	over 1,800 kgs
Ice cream	over 31,000 kgs

* Based on figures provided by the participating businesses/organizations.

With respect to pricing, food standards and food delivery preferences it is difficult to make generalizations about 'typical' interests / preferences / requirements. Some businesses / organizations are willing to make special allowances (e.g. blemished fruit can be used in baking) while others have much more rigid conditions that need to be met.

Although some businesses / organizations indicated that they would be willing to pay a premium price for a locally produced food item (e.g. 10-20%), it appears that most have a strong preference for the local food option to be competitively priced with non-local food options.

[1] It is important to note that the figures presented in the table are derived from a small sample of businesses / organizations across the local food chain. As such, these figures represent only a partial picture of the total volume/weight of food items sourced from outside the Algoma / Manitoulin / Sudbury region.

Many of the businesses / organizations also expect / want producers to have accredited food safety certifications in place and most expect / want producers to provide delivery of the product (or at least make the arrangements for the product to be delivered). These details along with specific quantities and other preferences/requirements (e.g. packaging units, types of meat cuts, etc.) are expanded on in the electronic data base that accompanies this report. Interested stakeholders are encouraged to review the business / organization profiles in the data base to gain a detailed understanding of the food preferences and needs at the level of the individual business / organization.

When we examine the challenges that local producers face in marketing their products, we find that many of the issues they face tie into the factors that discourage local businesses / organizations from buying their products. For example, producers feel that the pricing expectations that local businesses have are not very realistic when measured against the deep discounts that large volume food wholesalers/distributors can offer. Producers also noted that land speculation in the area has driven up property taxes and these costs need to be carried forward in pricing their products.

Producers acknowledge that the short growing season in the region results in limited availability for some products (e.g. fresh produce) and that smaller scale farm operations in the region cannot satisfy the entire food volume demands of major food retail and food service businesses / organizations. However, producers feel that if there was a greater willingness on the part of businesses / organizations to adjust their procurement practices for certain periods of the year, then local producers could supplement a portion of their food needs with locally grown products. Another problematic feature of the local growing season is that the peak food harvest period on the Island occurs after the peak tourism period.

Producers also acknowledge that they face challenges in meeting the delivery needs of buyers. Some producers noted that they have limited time and/or lack the appropriate transportation to provide delivery. It was also emphasized that filling small volume orders for distant/isolated locations is not cost effective.

Soil and climate conditions vary across the Island and producers emphasized that it’s important to understand what crops are best suited to the local conditions to maximize the production potential. Producers also noted that wildlife in the area can be damaging to production activities (e.g. deer grazing on crops, racoons and bears damaging maple syrup equipment).

With respect to meat processing, it was suggested that the options on the Island are very limited and the current facility does not meet the needs of every producer (e.g. accessibility, pricing, butchering specifications).

Another notable challenge identified by producers is the need for localized infrastructure capacity that will enable producers to meet the food handling/safety certification and processing needs of some businesses / organizations – especially food retail and food services. Producers suggested that a potential key action item going forward is to explore and support the development of a local Good Agricultural Practices (GAP) certified facility for handling / processing / labeling fresh produce products.

Other opportunities that producers feel need to be explored include:

- Encourage / facilitate discussions between local producers and retailers.
- Ensure that attractive, eye-catching wording and displays are used when showcasing locally grown products (e.g. in restaurant menus, in grocery stores, in gift stores).
- Revitalise the 'Made on Manitoulin' food branding campaign.
- Use strategic marketing at key entry points to the Island to inform tourists about the uniqueness of locally grown foods and where it can be accessed on the Island.
- Support the promotion and ongoing development of farmers' markets in the area. Ensure that the operating days/hours of the market are convenient and that a variety of food commodities are represented at the market to broaden the appeal of the market.

Additional opportunities that are more specific to Indigenous communities include:

- Explore the potential for introducing locally grown/harvested foods (e.g. deer meat, locally harvested/foraged foods) in local institutions (i.e. nursing home, schools etc.).
- Promote, hunting, trapping, harvesting, and farming activities as viable career opportunities and support and deliver training and skills development in these areas.
- Coordinate and promote opportunities for combining production / harvesting / trapping activities with community cooking demonstrations / workshops.
- Explore if/how program funding through IAPO can be better tailored to support new Indigenous farmers and if/how program funding can support more local/regional projects and initiatives.

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of Manitoulin based businesses / organizations across the four areas of food demand. The results section of the report and the accompanying electronic data base is intended to be used as a resource that interested stakeholders can access to search for additional details and to learn about the specific food needs / interests of individual businesses / organizations.

The results provide important cues for informing the role that local economic development officials and other interested stakeholders can take in facilitating, guiding and supporting actions to increase regional food production, processing and purchasing.

The following recommendations are informed by the survey and focus group results and they reflect the key themes that emerged from the study.

Communication

- Facilitate annual networking sessions between local producers and representatives from across the four areas of food demand to discuss their needs and share information. These sessions should be scheduled before the start of the peak tourism months (e.g. consider running the sessions in March/April).

- Provide communication tools and training / skills development initiatives to support producers in reaching buyers (e.g. using social media in promotions, preparing and deploying electronic newsletters).

- Explore, guide and support the development and/or application of a communication platform directed at businesses / organizations (food buyers) where producers can post / publicize their food production activities and the products they have to offer.[2]
    - The need for improved communication was emphasized by food retail and food service businesses / organizations. Information of particular interest includes production plans for the coming season/year, updates on what's currently available, delivery / pick-up options, and price list. Local businesses / organizations need to be regularly informed about the communication platform and guided on how it can be accessed and used.
    - The communication platform could potentially be integrated with a product ordering and delivery service (see recommendation on logistics below).

Logistics

- Explore and support the development and implementation of systems and mechanisms to coordinate / manage the ordering, handling and delivery of locally produced foods between producers and buyers.
    - The need for improved delivery mechanisms was emphasized by food retail and food service businesses / organizations. Features of particular interest include single point ordering, regular scheduling of deliveries, allowances for low volume purchases, and delivery options for remote areas.

Certification Standards

- Provide guidance and supports to producers to facilitate the adoption and maintenance of food safety certification standards (e.g. facilitate introductions / orientation to relevant industry organizations, coordinate information/training workshops in conjunction with industry organizations).[3]
    - Food processors, food retailers, and food service businesses / organizations expressed a strong interest/need for local food producers to follow government recognized food

[2] OntarioFresh.ca is an example of an existing Internet based information / communication platform where food producers, sellers, buyers and processors can post information about their operation and what they produce and/or procure as well as any services that they provide. However, at this time it appears that relatively few Algoma / Manitoulin / Sudbury based businesses are participating on the platform. Some business profiles are more complete than others. For example, it appears that most producers provide a list of the types of food items they produce and in many cases this information is supplemented with additional details (e.g. purchasing/payment methods, delivery options, liability insurance, food safety and traceability standards, organic certification, etc.). Some business profiles include a weblink to their pricing information and offer online purchasing. The website includes a search engine but there are limitations when searching by broad geographic regions. For example, a search for producers located in "Manitoulin" can result in an incomplete list -- specific communities in the region need to be searched to extract a more complete list from the directory.

[3] The Food Safety Recognition Program (FSRP) is led by the Canadian Food Inspection Agency (CFIA) with the participation of the provincial and territorial governments. Recognition acknowledges that a food safety program has been developed in line with a systematic and preventive approach to food safety based on international accepted standards (Hazard Analysis Critical Control Points – HACCP – principles); that the program conforms to federal, provincial and territorial legislation, policy and protocols; and that a food safety management system has been implemented in an effective and consistent manner. A number of different industry organizations are currently involved in FSRP including CanadaGAP Food Safety Program for Fruits and Vegetables, Canada Grains Council, Canadian Cattlemen's Association: Verified Beef Production, Canadian Pork Council: Canadian Quality Assurance Program, Canadian National Goat Federation: On-Farm Food Safety Program, Canadian Sheep Federation: Canadian Verified Sheep, Dairy Farmers of Canada: Canadian Quality Milk, Egg Farmers of Canada: Start Clean – Stay Clean, Canadian Honey Council. More information is available at: http://www.inspection.gc.ca/food/archived-food-guidance/safe-food-production-systems/food-safety-enhancement-program/recognition-program/eng/1299860970026/1299861042890

safety standards (i.e. handling, processing, packaging, transportation) through an accredited certification body.

- Explore and support the development of a local Good Agricultural Practices (GAP) certified facility that is accessible to producers in the region.
  - A food ordering and delivery system could potentially be integrated with the GAP certified facility.
  - This facility could potentially offer a variety of services (e.g. warehouse storage area including industrial size cooler/freezer rooms, designated delivery and shipping areas, vegetable/fruit processing area, commercial test kitchen for product development, public meeting rooms for hosting information and demonstration events).[4]

Manitoulin Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for Manitoulin to utilize in food marketing campaigns (e.g. revitalise the 'Made on Manitoulin' food branding campaign).
  - Emphasize the key values that local businesses / organizations associate with locally grown food in marketing campaigns (e.g. buying locally produced food contributes to the local economy / supports local businesses and families, locally produced food offers the highest quality for customers).
  - Use strategic marketing at key entry points to the Island to inform tourists about the uniqueness of locally grown food and where it can be accessed on the Island.

Additional Opportunities for Indigenous Communities

- Support the development and coordination of knowledge transfer activities and events directed at youth and the broader community.
  - Host and encourage participation in demonstration and skills development activities to promote hunting, trapping, harvesting and farming activities as viable career opportunities.
  - Host and encourage participation in demonstration and skills development activities related to traditional food preparation / cooking / preserving.

- Explore if/how program funding through IAPO can be better tailored to support new Indigenous farmers and if/how program funding can support more local/regional projects and initiatives.

[4] The term 'food hub' is sometimes used to describe these types of facilities and the scope of services offered can vary depending on local interests/needs. Examples of food hub feasibility studies:

- Winnipeg, Manitoba
  - http://www.foodmattersmanitoba.ca/wp-content/uploads/2014/06/WFH-Feasibility-Final-Report-mar-2014-photos.pdf
- Township of Langley, BC
  - https://www.tol.ca/your-township/plans-reports-and-strategies/food-hub-feasibility-study/

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1.0 Introduction

Introduction

The North Central Ontario Food and Agricultural Market Study (NFAMS) was initiated in June 2018 by the Rural Agri-Innovation Network (RAIN), a division of the Sault Ste. Marie Innovation Centre (SSMIC), and advanced by a broad group of organizations with interests in supporting agri-food development through market research in the Algoma, Manitoulin, and Sudbury area.[5]

The study was designed to examine the local food economy from the demand perspective for the purpose of gaining a better understanding of the regional market and facilitating initiatives / actions to increase regional food production, processing and purchasing. The information represents important input to the planning and decision-making process for various local stakeholders that are looking to support/expand the local agri-food economy (e.g. farmers, food processors, food retailers, food services, food programs, lending institutions, economic development officials and policy makers, Indigenous communities and organizations, etc.).

Key objectives of the NFAMS study are to:

- Identify and confirm the reasons why businesses / organizations value local food and the reasons that dissuade / prevent them from making greater use of locally grown / harvested foods
- Provide a tabulation of the amount of locally grown / harvested food products being purchased by businesses and organizations and identify areas for potential growth
- Identify and confirm the food price sensitivity interests of businesses and organizations
- Identify and confirm the interest of businesses and organizations to procure more locally grown / harvested foods
- Identify and confirm the challenges and opportunities for meeting the needs/interests of the four areas of demand from the perspective of producers / harvesters

The study was supported and guided by the RAIN Project Coordinator and a Project Steering Committee along with three local Outreach Assistants (one in each of the three districts).

This report focuses on the findings for Manitoulin District and includes select findings from Algoma District and the Sudbury / West Nipissing region for comparison purposes.

[5] This partnership has grown to include: RAIN/SSMIC, Local Food and Farm Co-ops, Superior East Community Futures, Community Development Corp of Sault Ste. Marie & Area, East Algoma Community Futures Development Corp., LaCloche Manitoulin Business Assistance Corporation, City of Greater Sudbury, Bruce Mines Agricultural Society, Mill Market, FedNor, Mississaugi First Nation, Wikwemikong Development Commission. For the purpose of this study, the Sudbury area includes Sudbury District, Greater Sudbury, and West Nipissing.

2.0 Methodology & Context

2.1 Who Did We Speak With?

The NFAMS study consisted of two major research elements: key informant interviews with local businesses and organizations representing four types of food demand (food processing, food retail, food services, and food programs) and focus group discussions with local growers / harvesters and related interest groups.

Key Informant Interviews with Businesses / Organizations
The intent of the study was to interview a sample of businesses / organizations across the Algoma / Manitoulin / Sudbury region to address the following areas of interest:[6]

- General interest and awareness of local grown / harvested foods
- Type and volume of food products purchased/sourced locally vs. non-locally
- Quality and packaging preferences/considerations
- Price preferences/considerations
- Other factors influencing purchasing decisions
- Interest in procuring more locally grown / harvested foods

The following four types of food demand were targeted for inclusion in the study:

1. Food processors – local processors: e.g. meat, fish, dairy, egg, grains, fruit/vegetables, other processing including breweries and wineries
2. Food retail – local independent grocers, convenience stores, food wholesalers / distributors
3. Food services – local independent restaurants, hotel and accommodation establishments, caterers and banquet halls, institutions including schools (primary, secondary, post secondary), day care centres, hospitals, assisted living facilities, municipal buildings, recreation centres, etc.
4. Food programs – local food banks, good food box programs, student nutrition programs, meal delivery service programs, community kitchens, etc.

Based on budget and timing considerations it was determined that approximately 95 businesses / organizations would be identified in each of the three districts and invited to participate in the study.[7] The distribution of businesses / organizations in the sample was purposefully structured to include a substantial number of food retail and food service type businesses/organizations (approximately 70%) supplemented with food processing businesses and food programs. A further consideration in the sampling approach was to purposefully include a mix of businesses and organizations located in major urban centres (i.e. Sault Ste. Marie, Greater Sudbury) and smaller communities.

An inventory of businesses / organizations was developed by the Outreach Assistants with support/guidance provided by the RAIN Project Coordinator, the Project Steering Committee and HCA. Part of the process for identifying candidate businesses was purposeful. For example, it was decided not to pursue major chain restaurants as part of this study as it was assumed that these establishments rely mostly on provincially / nationally integrated food distribution / delivery systems and there are greater limitations on food procurement decisions at the local

[6] HCA developed the interview guide in collaboration with the RAIN Project Coordinator and the Project Steering Committee (see Appendix A).
[7] West Nipissing was included as part of the study region and for reporting purposes the data collected for West Nipissing is included as part of the Sudbury region.

level. The final list consisted of 289 individual businesses / organizations representing the four areas of food demand and the three districts.[8]

The Outreach Assistants provided valuable support in facilitating the initial engagement process with the businesses and organizations. The Outreach Assistants were local community members and their familiarity with the local business and community environment helped to establish trust and confirm the legitimacy of the project. All 289 businesses / organizations were initially contacted by an Outreach Assistant and received an introduction to the study along with an invitation to participate in an interview or an online survey.

When members of the HCA team followed up with the businesses and organizations to confirm their interest and participation in the study, the contact person was typically well informed about the study and had few questions. The interviews were conducted between late August and early December 2018. Phone and email communication was used to engage with the businesses / organizations and attempts were made to schedule interviews on a day and time that was convenient for them.

It is important to note that the interviews were typically conducted during normal work hours which meant that finding a convenient time to have a fulsome discussion about food procurement activities could be challenging. In a small number of cases the interviews were conducted on first contact but more typically it took several attempts to schedule and complete the interviews.[9]

Rather than attempting to discuss details on every local food item of interest (which could represent a significant time commitment from the business /organization) we invited the representatives to comment on the 4 or 5 local food items that were of greatest interest to them. In some instances, the interview needed to be truncated as the interviewee could not commit to a long discussion.

Businesses / organizations were invited to complete an email version of the interview (survey) if that was their preference (rather than participating in a phone interview) and a total of 65 businesses / organizations chose this option of which 20 (31%) actually followed through and returned the completed survey.

[8] The actual number of contact names identified amounted to 295 persons as a small number of retail outlets had more than one representative (e.g. manager of produce section, manager of meat section, manager of baked goods section). As the lists of relevant business / organizations were developed for each district it was decided to adjust the target numbers to reflect the higher number of businesses / organizations in Algoma and Sudbury relative to Manitoulin.

[9] In some instances the interview had to be rescheduled several times. In a small number of cases, the Outreach Assistant completed the interview as the contact person was immediately available to participate.

As shown in the following table, a total of 184 businesses / organizations (64%) ultimately participated in the study. A total of 34 businesses / organizations (12%) decided not to participate in the study[10] and a further 71 (24%) could not be reached / were not able to commit to completing the interview.[11]

The individual response rates for Algoma, Manitoulin and Sudbury (i.e. interviews completed as a proportion of the total sample) were 70%, 72% and 53% respectively. The overall response rate when we factor out the businesses/organizations that declined to participate is 72%.

Within Manitoulin District, a total of 51 businesses / organizations were interviewed consisting of: [12]

- 6 food processing businesses
    - Includes bakeries/baked goods, preserves, confectionary, butchers/prepared meat processing, breweries
- 11 food retail businesses
    - Includes independent grocery stores, specialty stores (e.g. baked goods, meat), food wholesalers
- 26 food service businesses / organizations
    - Includes full service restaurants, cafes, diners, coffee shops, food trucks, institutions (health care centre), nursing home, day care centres, caterers, accommodation establishments (inns, motels)
- 8 food programs
    - Includes food banks, emergency food assistance, breakfast programs, good food box programs, community kitchens, community support services

The study reflects a small sample of local food procurement activities across the four areas of food demand and the results cannot be generalized across the broader population of businesses / organizations. However, the share of processing, retail and service related businesses / organizations in the sample is somewhat reflective of the distribution of the total population of these types of establishments across the study area.[13]

[10] When businesses / organizations declined to participate the main reasons were related to lack of time or the feeling that the study was not relevant to them.

[11] Multiple attempts were made to engage with businesses / organizations using phone and email. There were many instances where the contact person was unavailable / too busy to commit to participating.

[12] For purpose of conducting the analysis, each business / organization was classified into one of the four areas of food demand outlined above. This was done in collaboration with the Outreach Assistants, the RAIN Project Coordinator and the Project Steering Committee. There were some businesses that were involved in two types of activities (e.g. food processing and food retail) and a best judgement was made to place each business in an appropriate food demand category.

[13] In our review of business tabulation data from Statistics Canada (2018) we note that in Manitoulin District there are a total of 5 food / beverage manufacturing businesses, 21 food retail and wholesale businesses, and 90 food service and accommodation businesses. See Appendix B for additional details.

Table 1: Number of businesses / organizations interviewed by type of food demand

Algoma District				
Type of food demand	**Total sample**	**Interviews completed**	**Declined to participate**	**Could not be reached**
Food processing	11	9	1	1
Food programs	10	10	0	0
Food retail	26	20	1	5
Food services	56	33	8	15
Total	**103**	**72**	**10**	**21**
Manitoulin District				
Type of food demand	**Total sample**	**Interviews completed**	**Declined to participate**	**Could not be reached**
Food processing	10	6	1	3
Food programs	8	8	0	0
Food retail	14	11	0	3
Food services	39	26	3	10
Total	**71**	**51**	**4**	**16**
Greater Sudbury / Sudbury District				
Type of food demand	**Total sample**	**Interviews completed**	**Declined to participate**	**Could not be reached**
Food processing	22	14	2	6
Food programs	12	9	3	0
Food retail	31	15	5	11
Food services	50	23	10	17
Total	**115**	**61**	**20**	**34**
Total (all three districts combined)				
Type of food demand	**Total sample**	**Interviews completed**	**Declined to participate**	**Could not be reached**
Food processing	43	29	4	10
Food programs	30	27	3	0
Food retail	71	46	6	19
Food services	145	82	21	42
Total	**289**	**184**	**34**	**71**

Collectively, the 184 businesses / organizations are distributed across 58 different communities. Approximately one third of the businesses / organizations are based in large urban centres (Sault St. Marie and Sudbury) and two thirds are located in smaller communities. A small number of food programs reported that their catchment area is regional in scope rather than community based.

The 51 Manitoulin based businesses / organizations are located in 19 different communities (a small number of businesses in the LaCloche region have been combined with Manitoulin).

Table 2: Number of businesses / organizations interviewed by community

Algoma		Manitoulin / LaCloche [b]		Sudbury	
Sault Ste. Marie [a]	27	Gore Bay	10	Sudbury	35
Blind River	10	Little Current	8	Warren	4
Elliot Lake	7	Manitoulin	5	Espanola	3
Richards Landing	4	Wiikwemkoong FN	4	Verner	3
Spanish	4	Massey	3	Alban	1
Iron Bridge	3	Mindemoya	3	Atikameksheng Anishnawbek FN	1
Thessalon	3	Espanola	2	Capreol	1
Bruce Mines	2	Kagawong	2	Chelmsford	1
Hilton Beach	2	Manitowaning	2	Coniston	1
Wawa	2	Providence Bay	2	Garson	1
Algoma	1	Evansville	1	Hanmer	1
Algoma Mills	1	Ice Lake	1	Killarney	1
Batchawana Bay	1	Meldrum Bay	1	Levack	1
Desbarats	1	Perivale	1	Lively	1
Echo Bay	1	Sagamok FN	1	Markstay	1
Garden River	1	Sheshegwaning FN	1	Massey	1
Spragge	1	South Bay Mouth	1	Noelville	1
White River	1	Spring Bay	1	Onaping	1
		Tehkummah	1	Val Caron	1
		Whitefish Falls	1	Walden	1
Total	**72**		**51**		**61**

[a] Several individuals representing different departments were interviewed in one food retail business in Sault Ste. Marie.

[b] Two communities, Espanola and Massey, are located in the southwest corner of Sudbury District and are in close proximity to Manitoulin Island. In the process of developing the business lists and collating the data a small number of businesses in Espanola and Massey were inadvertently placed in the Manitoulin / LaCloche data set.

Of the 168 businesses / organizations that provided details on the year they were established, 32% have been in operation for five years or less while 28% have been in operation for between 6 and 20 years and 40% have been in operation for more than 20 years.

Table 3: Number of businesses / organizations by length of time in operation

Years in operation	Algoma	Manitoulin	Sudbury	Total	Percent
1 to 5 years	18	16	19	53	31.5%
6 to 10 years	6	6	7	19	11.3%
11 to 15 years	8	5	4	17	10.1%
16 to 20 years	5	0	6	11	6.5%
More than 20 years	32	20	16	68	40.5%
Total	**69**	**47**	**52**	**168**	**100%**

Of the 147 businesses / organizations that provided details on the number of employees they have, 42% have five employees or less while 34% have between 6 and 20 employees and 24% have more than 20 employees.

Table 4: Number of businesses / organizations by number of employees

Number of employees	Algoma	Manitoulin	Sudbury	Total	Percent
1 to 5	29	19	14	62	42.2%
6 to 10	13	9	4	26	17.7%
11 to 15	6	3	3	12	8.2%
16 to 20	6	3	3	12	8.2%
More than 20	10	10	15	35	23.8%
Total	**64**	**44**	**39**	**147**	**100%**

Food programs and some food service organizations rely on volunteers to support their operations. Collectively, over 1,700 volunteers contribute to the operations of the organizations that were interviewed.

Focus Group Discussions with Food Producers / Harvesters

A total of five focus group discussion sessions were conducted with local producers / harvesters across the region to discuss the key challenges / barriers they face in selling / marketing their products to local businesses and organizations and to identify the specific factors that limit their ability to expand their operation. A second objective of the sessions was to discuss the key opportunities / areas for growth as viewed by local producers / harvesters. The final objective of the sessions was to validate select findings that emerged from the interviews with businesses / organizations from the four areas of food demand.

Producers and harvesters were identified through a collaborative approach involving the RAIN Project Coordinator, the Project Steering Committee, and the Outreach Assistants. The aim was to have between 10-12 participants at each session representing a variety of production / harvesting activities. At least 85 individuals were invited to attend the sessions and about 60 expressed an interest in attending. A total of 41 individuals actually attended the five focus group discussions. The following table shows the distribution of attendees by location and the types of locally grown / harvested foods produced by the attendees.

Table 5: Number of attendees at the focus group discussions

Date	Location of the session	Number of attendees	Types of locally grown / harvested foods produced by the attendees
Nov. 7	Bruce Station	14	Market garden and greenhouse vegetables, strawberries, mushrooms, maple syrup, free range eggs, beef, lambs, chickens
Nov. 26	Providence Bay	10	Market garden vegetables, strawberries, maple syrup; honey, pork, lamb, chickens, craft brewing
Nov. 27	Wikwemikong	7	Vegetables, wild game, wild harvested cranberries, blueberries, mushrooms, juniper berries
Nov. 28	Azilda	5	Potatoes, hydroponic kale, herbs, microgreens, red deer and elk
Nov. 29	Sturgeon Falls	5	Market garden vegetables and seeds, strawberries, raspberries, haskap berries, blueberries, maple syrup, honey, chickens

Note: A small number of local/regional economic development officials attended each of the sessions.

Secondary Data Review

HCA conducted a review of secondary data to provide context to the study. This included a review of NAICS business classification data from Statistics Canada[14] as well as relevant agricultural production data from the Census of Agriculture (Statistics Canada).

2.2 What are the Study Limitations?

It is important to emphasize that the study was not intended to provide a complete census of all businesses / organizations across the four areas of food demand. As noted earlier in the report, the study reflects a small sample of local food procurement activities across the four areas of food demand and the results cannot be generalized across the broader population of businesses / organizations.

Additionally, owing to the limited time availability that businesses / organizations could commit to an interview (or complete an electronic survey), representatives were invited/encouraged to discuss the 4 or 5 local food items that were of greatest interest to them (i.e. the objective was to gain in-depth details on a few food items rather than limited amounts of detail on many food items). In some instances, the representative was only available for a limited interview time (e.g. 15 minutes) and the interview had to be shortened.

[14] The North American Industry Classification System (NAICS) is used by business and government to classify business establishments according to type of economic activity.

2.2 What Type of Food Production Occurs in Manitoulin District?

A review of data from the Census of Agriculture provides a snapshot of the breadth / diversity of agricultural production occurring in Manitoulin District.

The 2016 Census counted 201 farms in Manitoulin District, a 22% decrease from the 2006 census (258 farms). Over the same ten-year period the total reported farm area in Manitoulin District declined from 178,144 acres in 2006 to 141,316 in 2016, or 21%.[15]

Although the total number of farms and the area of farmland in active production declined over the last ten years, the value of agricultural production continues to be substantial. In 2016, the 201 farms in Manitoulin District reported a combined total of $14.1 million in gross farm receipts.[16]

Agricultural activity in Manitoulin District is diverse and includes beef and dairy production, hog farming, poultry and egg production, sheep and goat farming, and apiculture.[17] Manitoulin District farmers are also active in field crop production (e.g. grains and oilseeds, potatoes, other vegetable crops), greenhouse production (e.g. vegetables), and tree fruit (e.g. apples) and berry production (e.g. strawberries, raspberries) as well as mushroom production and maple syrup production.[18]

Smaller acreage farms (under 70 acres) account for approximately 10% of the total farms in Manitoulin District while mid-sized farms (70 - 239 acres) account for 25% of the total and larger acreage farms (240 acres+) account for 64% of the total farms.

Manitoulin District reported 141,316 acres of farmland in 2016 of which approximately 19% is in crop production. Major field crops in terms of total acreage include hay (21,899 acres – tame hay and alfalfa), barley (1,350 acres), mixed grains (901 acres), corn (642 acres), soybeans (597 acres), and oats (504 acres). Other field crops grown on smaller amounts of acreage include canola, spring and winter wheat, rye, buckwheat, peas, beans, potatoes and sunflowers.

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[15] It is important to note that the farm area reported in the Census of Agriculture represents the total land owned, used and/or controlled by active farmers and does not reflect the total farmland area as defined by the Municipal Property Assessment Corporation (MPAC). MPAC defines Total Farmland as all landed assessed for agricultural purposes even if that land is not actively farmed. MPAC total farmland should include most or all of the Agricultural Census land plus land that is not actively farmed but remains assessed for agricultural purposes. In 2016, the total farmland area in Manitoulin District as defined by MPAC amounted to 292,849 acres which represents an additional 151,533 acres not captured in the Census of Agriculture.

[16] As defined by Statistics Canada, a census farm refers to a farm, ranch or other agricultural operation that produces at least one of the following products intended for sale: crops, livestock, poultry, animal products, greenhouse or nursery products, Christmas trees, mushrooms, sod, honey or bees, and maple syrup products. Also included are feedlots, greenhouses, mushroom houses and nurseries; farms producing Christmas trees, fur, game (animals and birds), sod, maple syrup, or fruit and berries; beekeeping and poultry hatchery operations; operations with alternative livestock (bison, deer, elk, llamas, alpacas, wild boars, etc.) or alternative poultry (ostriches, emus, etc.), when the animal or derived products are intended for sale; backyard gardens if agricultural products are intended for sale; and operations involved in boarding horses, riding stables, and stables for housing or training horses, even if no agricultural products are sold. Sales in the previous 12 months are not required, but there must be the intention to sell.

[17] Although not reported in the Census of Agriculture, there are wild game hunting activities as well as local harvesting activities (e.g. wild plants, mushrooms, berries) that contribute to local food systems.

[18] It is important to note that the amount of production can and does fluctuate from year to year (e.g. number of acres in production, number of livestock units). Changes in the production numbers can be linked to normal farm practices (e.g. periodic crop rotation practices) but also farm contraction and/or expansion. The reported census data is incomplete for some categories of production as Statistics Canada does not release data where there are very few farms reporting (for the purpose of protecting confidentiality).

With respect to vegetables, a total of 16 farms reporting growing field vegetables in 2016. Vegetables grown in Manitoulin in 2016 included sweet corn, cabbage, green/wax beans, tomatoes, cucumbers, green peas, squash/zucchini, carrots, lettuce, beets and others. Due to confidentially restrictions used by Statistics Canada, there is no available data on the actual amount of acreage in production for most of the vegetable commodities listed above. However, the Census of Agriculture reveals that at least 5 acres of sweet corn were produced as well as 4 acres of tomatoes. Although detailed data for greenhouse vegetable production is not available, the Census indicates that there were at least three producers involved in vegetable greenhouse production in 2016. The Census also indicates that there were at least four mushroom producers and 29 maple syrup producers in Manitoulin District in 2016.

With respect to livestock production in Manitoulin District, some categories have increased over the 2006 – 2016 period while others have declined. In general, all categories of cattle with the exception of steers saw a drop off in numbers. The number of steers reported in Manitoulin in 2016 was 2,498 vs. 1,490 in 2006. The number of ewes (430) and lambs (480) remained fairly stable between 2006 and 2016 while the number of goats doubled from 52 to 108. Some categories of poultry also experienced an increase over the 2006 – 2016 period including laying hens (851 to 1,146 birds) and broilers/roasters (310 to 645 birds).

With respect to the farm operator profile, the total number of farm operators in Manitoulin District declined from 345 in 2006 to 265 in 2016. The share of women farm operators in Manitoulin District increased slightly from 22% in 2006 to 23% in 2016.[19] Although the average age of farm operators in Manitoulin District increased from 56 years to 59 years between 2006 and 2016 (54 years), there has been an increase in the share of farm operators under 35 years of age (3% in 2006 vs. 6% in 2016). This change is consistent with trends at the national level.[20]

In 2016, 21% of all farms in Manitoulin District reported that they sold directly to consumers which is almost double the national figure.[21] Of the 42 Manitoulin farms that were marketing directly to consumers in 2016, 95% sold unprocessed agricultural products (e.g. fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) while 38% sold value added products (e.g. jellies, sausages, etc.). The most common method used by Manitoulin farmers to sell directly to consumers is through farm gate activities (e.g. stands, kiosks, u-pick) with 35 farms participating in this type of marketing activity. A total of 15 farms reported that they sell directly to consumers through farmers' markets and one farm reported that they utilize Community Supported Agriculture (CSA) methods for their sales activity.[22]

Note: data tables on agricultural production in Manitoulin District from the Census of Agriculture (2006-2016) are presented in Appendix C.

[19] At the national level, women accounted for 27.4% of the total farm operators in 2006 and 28.7% in 2016. Source: Statistics Canada. 2016 Census of Agriculture - The Daily, May 10, 2017. https://www150.statcan.gc.ca/n1/en/daily-quotidien/170510/dq170510a-eng.pdf?st=_at4E5cX

[20] At the national level, farm operators under 35 years of age accounted 8.2% of the total operators in 2006 and 9.1% in 2016. Source: Ibid.

[21] At the national level, 12.7% of farms reported that they sold directly to consumers in 2016. This data was not collected in previous Census periods. Source: Ibid.

[22] Community Supported Agriculture is an agricultural marketing innovation whereby a farmer or a group of farmers partner with individuals from the local area who make an investment in the farm in advance of a growing season and become members of the CSA. As members, they agree to share both the rewards and the risks of the farming operation for that season. Members receive a share of the harvest (usually weekly), which often consists of vegetables, but might also include fruit, eggs, meat or other products.
http://www.uoguelph.ca/~jdevlin/CSA-in-Canada-2016-Report

Agricultural Infrastructure / Institutions / Associations in Manitoulin / LaCloche

The agriculture sector in Manitoulin District is supported by a variety of hard and soft infrastructure assets. Hard infrastructure elements include an abattoir (Manitoulin Island Community Abattoir, MICA – Providence Bay), a dairy processor (Farquhar Dairies Limited – Espanola), an egg grading station (Runnalls egg grading station – Evansville), fish processing (Purvis Fisheries – Silver Water; Cold Water Fisheries – Little Current), and other food processing activities across the region (e.g. butchers, bakeries, brewery).

Manitoulin District also features several farmers' markets including the NEMI Farmers' Market (Little Current), Gore Bay Farmers' Market, Community Heritage Market (Manitowaning), Mindemoya Farmers' Market, M'Chigeeng Farmers' Market, Kagawong Farmers Market, South Baymouth Farmers' Market, and Spanish Outdoor Market. There are also farmers' markets in Massey and Espanola.

A number of different producer and commodity groups / associations are active in Manitoulin including:

- Manitoulin Cattlemen's Association
- Manitoulin Community Food Network
- Manitoulin Livestock Exchange
- Manitoulin Soils and Crop Improvement Association
- Manitoulin West Sudbury Milk Producers' Association
- Manitoulin-North Shore Federation of Agriculture
- Christian Farmers' Association of Northeastern Ontario
- Ontario Sheep Farmer - District 11[23]
- Ontario Aquaculture Association (formerly the *Northern Ontario Aquaculture Association)*

Additional information on Manitoulin agri-organizations and businesses including contact information can be obtained through the FarmNorth.com web portal.[24]

[23] District 11 covers Kenora, Rainy River, Thunder Bay, Cochrane, Algoma, Sudbury, Temiskaming, Nipissing and Manitoulin.
[24] www.farmnorth.com/District.aspx?district_id=4&name=Manitoulin

Aquaculture and Commercial Fisheries in the Algoma / Manitoulin / Sudbury Region

Aquaculture and commercial fisheries also represent important components of the local / regional food production system. In 2017, Ontario aquaculture farms produced an estimated 5,900 tonnes of fish and shrimp, primarily for human consumption.[25] The majority of the production was of rainbow trout (5,530 tonnes) and lake-based, net-pen production of rainbow trout in the Georgian Bay and Lake Huron area accounted for 89% of the total aquacultural output. There is significant rainbow trout aquacultural activity in Manitoulin District and there is an indoor shrimp production facility in Sudbury. In general, Ontario's aquaculture sector is currently experiencing strong growth with ongoing expansion in the rainbow trout sector, new species being raised, improved technologies being used, and new opportunities being exploited with inventive approaches to both land-based and open-water aquaculture. There has been significant expansion in Indigenous (First Nations) aquaculture, growing primarily rainbow trout in net pens in the Great Lakes.

With respect to wild fish harvesting, there are Aboriginal and non-Aboriginal commercial fisheries across Ontario including fisheries in the Algoma / Manitoulin / Sudbury region. There are nearly 650 active commercial fishing licences in Ontario, of which 160 are held by First Nations communities, and First Nations and Métis individuals. In 2011, commercial licence holders in Ontario caught nearly 12,000 tonnes of fish. The majority of commercial fishing licences are in northern Ontario. Some of the more common species harvested include sturgeon, herring, whitefish, lake trout, perch and pickerel.[26]

[25] Source: 'AQUASTATS' Ontario Aquacultural Production in 2017 AQUACULTURE CENTRE By: Richard D. Moccia and David J. Bevan Aquaculture Centre, University of Guelph May 2018 https://ontarioseafoodfarmers.ca/wp-content/uploads/2018/06/AQUASTATS_Fact-sheet-2017-Final.pdf

[26] Ontario's Provincial Fish Strategy – Fish for the Future. 2015.

3.0 Results

Results Index

This section of the report is organized into the following four subsections: local food awareness and interest, motivations and challenges, locally purchased products, and challenges and opportunities from a producer perspective. This index is meant to be used as an interactive tool. Click on the headings below to jump to the different sections and click on the 'results index' in the top right-hand corner of the following pages to be brought back to this page. Readers should review the introductory notes in section 3.3. for interpreting the data in sections 3.3.1 to 3.3.4.

3.1 What Interest do Businesses / Organizations have in Locally Grown Food?

How Many Businesses / Organizations are Sourcing Locally Grown Food?
The majority of the businesses / organizations interviewed in all three districts confirmed that they are procuring some amount of locally grown or harvested foods from the Algoma / Manitoulin / Sudbury area.

In Manitoulin District, 76% of the respondents reported that they are currently procuring some amount of locally grown or harvested foods from the Algoma / Manitoulin / Sudbury area while a further 16% indicated that although they are not procuring locally grown at this time, they are interested in exploring options.

Table 6: Current local food procurement activity by location of business / organization

Are you procuring locally grown / harvested foods from the Algoma / Manitoulin / Sudbury area?	Algoma		Manitoulin		Sudbury	
	#	%	#	%	#	%
Yes	47	62.7%	39	76.5%	49	80.3%
Not at this time but interested	17	22.7%	8	15.7%	8	13.1%
No, not at all	11	14.7%	4	7.8%	4	6.6%
Total	**75**	**100.0%**	**51**	**100.0%**	**61**	**100.0%**

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that a higher proportion of businesses / organizations based in the large urban centres are currently procuring locally grown compared to smaller communities in the study area (77% vs. 70%). We also note that a further 11% of the urban based and 21% of the rural based businesses / organizations have an interest in procuring locally grown / harvested foods even though they are not doing so at this time.

When we examine current local food procurement activity by type of business / organization we find that over 70% of the representatives in three of the four areas of food demand – food programs, food retail, food services – are currently procuring some amount of locally grown or harvested foods from the Algoma / Manitoulin / Sudbury area. Close to 60% of the representatives from the food processing sector are currently procuring some amount of locally grown or harvested foods from the Algoma / Manitoulin / Sudbury area. An additional 20%+ of the respondents involved with food processing, food programs and food services indicated that they have an interest in procuring locally grown / harvested foods even though they are not doing so at this time.

Table 7: Current local food procurement activity by type of business / organization

Are you procuring locally grown / harvested foods from the Algoma / Manitoulin / Sudbury area?	Food processing		Food programs		Food retail		Food services	
	#	%	#	%	#	%	#	%
Yes	17	58.6%	20	74.1%	38	77.6%	60	73.2%
Not at this time but interested	8	27.6%	6	22.2%	2	4.1%	17	20.7%
No, not at all	4	13.8%	1	3.7%	9	18.4%	5	6.1%
Total	**29**	**100%**	**27**	**100%**	**49**	**100%**	**82**	**100%**

How do Businesses / Organizations Define 'Locally Grown'?

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed. Businesses and organizations were asked to identify the reference region that they associate with locally grown / harvested food. For the purpose of the analysis we broke the findings out by the following categories:

- Algoma or Manitoulin or Sudbury
- Algoma and Manitoulin and Sudbury (general area combined)
- Northern Ontario (Algoma / Manitoulin / Sudbury and other regions of northern Ontario)
- Ontario (includes areas of Ontario beyond northern Ontario)
- Canada (areas of Canada beyond Ontario)

With respect to the businesses / organizations based in Manitoulin District, approximately 37% of the representatives interviewed identified local food as being something that is produced / harvested within the boundaries of Manitoulin District. A further 10% of the representatives identified local food as being something that is produced / harvested in the general area of Algoma / Manitoulin / Sudbury and 12% identified local food as being something that is produced / harvested in northern Ontario. Approximately 41% of the representatives have an expanded definition of local food that encompasses areas of southern Ontario and/or other areas of Canada.

The findings for the businesses / organizations based in Manitoulin District are very similar to Algoma District while the findings for businesses / organizations based in the Sudbury region show greater recognition for northern Ontario in general as a source for locally grown / harvested foods.

Table 8: Definition of local food by location of business / organization

Area referenced as local	Algoma representatives		Manitoulin representatives		Sudbury representatives	
	#	%	#	%	#	%
Algoma	27	36.0%	-	-	-	-
Manitoulin	-	-	19	37.3%	-	-
Sudbury	-	-	-	-	12	19.7%
Algoma & Manitoulin & Sudbury	10	13.3%	5	9.8%	9	14.8%
Northern Ontario	9	12.0%	6	11.8%	13	21.3%
Ontario	25	33.3%	17	33.3%	20	32.8%
Canada	4	5.3%	4	7.8%	7	11.5%
Total	**75**	**100.0%**	**51**	**100.0%**	**61**	**100.0%**

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that a higher proportion of businesses / organizations based in the large urban centres associate locally grown with Ontario and Canada compared to smaller communities in the study area (49% vs. 37%).

When we examine how local food is defined by type of business / organization we find that over half of all representatives in each of the four areas of food demand identified local food as being something that is produced / harvested within some part of northern Ontario. Furthermore, over 40% of the representatives in three areas of food demand – food processing, food programs,

food services – specifically identified local food as being something that is produced / harvested within some part of Algoma / Manitoulin / Sudbury.

Table 9: Definition of local food by type of business / organization

Area referenced as local	Food processing representatives		Food program representatives		Food retail representatives		Food service representatives	
	#	%	#	%	#	%	#	%
Algoma or Manitoulin or Sudbury	9	31.0%	13	48.1%	12	24.5%	24	29.3%
Algoma & Manitoulin & Sudbury	3	10.3%	4	14.8%	5	10.2%	12	14.6%
Northern Ontario	3	10.3%	1	3.7%	11	22.4%	12	14.6%
Ontario	11	37.9%	7	25.9%	20	40.8%	25	30.5%
Canada	3	10.3%	2	7.4%	1	2.0%	9	11.0%
Total	**29**	**100.0%**	**27**	**100.0%**	**49**	**100.0%**	**82**	**100.0%**

A number of the representatives from Manitoulin District elaborated on their views of what locally grown means to them. The following responses illustrate the variation in range that stakeholders associate with the term locally grown.

- *Our most locally grown source are the donations we receive from local gardens. Regionally, we have food donated from areas between Sault Ste. Marie and Parry Sound.*
- *We receive food from home gardens every year.*
- *Locally grown is what we grow in our own community from our community gardens… we follow the whole life-cycle of the plant – from seed to harvest.*
- *We purchase what we can from the local grocery stores – but that doesn't mean that the products are necessarily grown in the area.*
- *It depends on what the food item is – for fresh produce its' 45 minutes maximum. For frozen I prefer to get things that are within 1-1.5hr away.*
- *Locally grown food is from Manitoulin Island*
- *Local food comes from very nearby, e.g. Gore Bay*
- *Because we're on the island people generally think of island produce as local. However, we also include the North Shore and Sudbury as part of our local definition when we try to source local. For practical reasons (e.g. limited availability issues) we also try to source from Ontario more generally.*
- *We try to source all of our food as locally as possible… for us, that means the immediate area – Manitoulin island. However, when things aren't available in the immediate area we will branch out to northern Ontario first and then we'll look for options in the rest of the province and then Canada more broadly.*
- *We grow a lot of our own food ingredients – that's the most local. Occasional trips are made to Sudbury to get other ingredients and that involves a two-hour trip.*
- *It depends on the product… it can be fish that's purchased from fishermen on the nearby island or other food that's sourced from across Canada.*
- *We include southern Ontario in our local food definition (e.g. Barrie, Kitchener)*
- *The definition depends on the product… some products you can get close by (e.g. fish from Purvis). However, there are not a lot of local food options on the island… while*

there is some farming activity here, there's never been enough fresh produce to consistently meet our needs.

- *Locally grown food should be within 500 km*

How Interested and Aware are Businesses / Organizations about Local Food?
Businesses and organizations were asked to rate their level of interest in sourcing and using locally grown / harvested foods using a 10 point scale where 1 = 'not at all interested' and 10 = 'very interested'.

The average scores on level of interest for the three districts are fairly similar and show a high level of interest:

- The scores provided by 75 representatives for Algoma District ranged from 1 to 10 with an average score of 8.2
- The scores provided by 51 representatives for Manitoulin District ranged from 1 to 10 with an average score of 8.8
- The scores provided by 58 representatives for the Sudbury region ranged from 0 to 10 with an average score of 8.5

There is greater variability when we compare the average scores for the four types of food demand with food services and food programs showing higher levels of interest vs. food retail and food processing:

- The scores provided by 28 representatives for food processing businesses ranged from 0 to 10 with an average score of 7.5
- The scores provided by 27 representatives for food programs ranged from 5 to 10 with an average score of 8.9
- The scores provided by 47 representatives for food retail businesses ranged from 1 to 10 with an average score of 8.1
- The scores provided by 82 representatives for food service businesses / organizations ranged from 0 to 10 with an average score of 8.8

Businesses and organizations were asked to rate their level of personal awareness of local food availability and options using a 10 point scale where 1 = 'not at all interested' and 10 = 'very interested'.

Again, the average scores for the three districts are fairly similar but reveal that the level of awareness is much lower than level of interest:

- The scores provided by 73 representatives for Algoma District ranged from 1 to 10 with an average score of 6.3
- The scores provided by 51 representatives for Manitoulin District ranged from 1 to 10 with an average score of 6.8
- The scores provided by 58 representatives for the Sudbury region ranged from 0 to 10 with an average score of 6.5

There is greater variability when we compare the average scores for the four types of food demand:

- The scores provided by 28 representatives for food processing businesses ranged from 0 to 10 with an average score of 6.7
- The scores provided by 27 representatives for food programs ranged from 2 to 10 with an average score of 7.0

- The scores provided by 45 representatives for food retail businesses ranged from 1 to 10 with an average score of 6.3
- The scores provided by 82 representatives for food service businesses / organizations ranged from 0 to 10 with an average score of 6.4

How do Businesses / Organizations Typically Stay Informed about Local Food Options?
Businesses and organizations were asked to identify the ways in which they typically stay informed about local food availability and options. The most common means by which businesses and organizations stay informed about local food options is through direct communication with growers and harvesters. Approximately half of all the representatives interviewed in each of the three districts identified direct communication as a key approach for staying informed about local food options.

In Manitoulin, the next most common approaches include subscribing to relevant newsletters / social media (25%), attending farmers' markets (21%) and accessing information through food distributors / wholesalers (10%). Approximately 8% of the Manitoulin based representatives are currently not taking any action to stay informed about local food options.

Table 10: Current approaches used to stay informed about local food options by location of business / organization

Current approaches used to stay informed about local food options	Algoma (n=75)		Manitoulin (n=51)		Sudbury (n=61)	
	#	%	#	%	#	%
Direct communication with growers and harvesters	37	49.3%	26	51.0%	30	49.2%
Membership in local producer networks / associations	3	4.0%	3	5.9%	4	6.6%
Subscribe to relevant newsletters / social media	8	10.7%	13	25.5%	15	24.6%
Review producer websites	3	4.0%	1	2.0%	5	8.2%
Food distributors / wholesalers provide information	19	25.3%	5	9.8%	15	24.6%
Food retailers provide information	2	2.7%	3	5.9%	4	6.6%
Attending farmers' markets	11	14.7%	11	21.6%	15	24.6%
Not applicable, currently not taking any action to stay informed	13	17.3%	4	7.8%	8	13.1%

Note: businesses/organizations were allowed to identify more than one approach.

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that for both groups the most common means by which businesses and organizations stay informed about local food options is through direct communication with growers and harvesters. However, a much higher proportion of the businesses / organizations based in the large urban centres are using direct communication compared to smaller communities in the study area (59% vs. 45%). In general, it appears that businesses / organizations based in the large urban centres are more active in staying informed about local food options. Compared to businesses / organizations based in smaller communities, a higher proportion of the urban based businesses / organizations stay informed by attending farmers' markets (26% vs. 16%) and subscribing to relevant newsletters and social media (23% vs. 17%). Urban based businesses / organizations also rely on food distributors / wholesalers to provide information to a much greater extent than businesses / organizations based in smaller

communities (31% vs. 16%). An almost equal proportion of urban and small community based businesses / organizations are currently not taking any action to stay informed about local food options.

When we examine current approaches to stay informed by the type of business / organization we find that direct communication with growers / harvesters is the most common approach used in each of the four areas of food demand (37% to 55%). Over 20% of the representatives with food retail and food service operations as well as food programs indicated that they also rely on food distributors / wholesalers to provide information about local food options. Farmers' markets also appear to represent an important source of information for all four areas of food demand.

Table 11: Current approaches used to stay informed about local food options by type of business / organization

Current approaches used to stay informed about local food options	Food processing (n=29)		Food programs (n=27)		Food retail (n=49)		Food service (n=82)	
	#	%	#	%	#	%	#	%
Direct communication with growers and harvesters	16	55.2%	10	37.0%	27	55.1%	40	48.8%
Membership in local producer networks / associations	3	10.3%	3	11.1%	2	4.1%	2	2.4%
Subscribe to relevant newsletters / social media	3	10.3%	10	37.0%	7	14.3%	16	19.5%
Review producer websites	3	10.3%		0.0%	2	4.1%	4	4.9%
Food distributors / wholesalers provide information	5	17.2%	6	22.2%	10	20.4%	18	22.0%
Food retailers provide information	2	6.9%	2	7.4%	2	4.1%	3	3.7%
Attending farmers' markets	7	24.1%	7	25.9%	9	18.4%	14	17.1%
Not applicable, currently not taking any action to stay informed	5	17.2%	2	7.4%	9	18.4%	9	11.0%

Note: businesses/organizations were allowed to identify more than one approach.

How do Businesses / Organizations Prefer to be Informed about Local Food Options?

Businesses and organizations were asked to identify the best ways for local growers / harvesters to provide them with information about their products. One of the highly preferred means by which businesses and organizations want to be informed about local food options is direct communication with growers and harvesters. Close to 60% or more of all the representatives interviewed in each of the three districts identified direct communication as a preferred approach for staying informed about local food options. The use of social media and/or producer newsletters consistently ranked as the second most common preferred means of being informed about local food options in each of the three districts.

Table 12: Most preferred means by which businesses / organizations want to be informed about local food options by location of business / organization

Most preferred ways for being engaged / informed about local food options	Algoma (n=75)		Manitoulin (n=51)		Sudbury (n=61)	
	#	%	#	%	#	%
Direct communication with growers and harvesters	47	62.7%	37	72.5%	35	57.4%
Through local producer networks / associations	3	4.0%	4	7.8%	5	8.2%
Through producer newsletters / emails / social media	24	32.0%	16	31.4%	15	24.6%
Through producer websites	7	9.3%	1	2.0%	6	9.8%
Through food distributors / wholesalers providing information	10	13.3%	5	9.8%	14	23.0%
Through food retailers providing information	2	2.7%	3	5.9%	3	4.9%

Note: businesses/organizations were allowed to identify more than one approach.

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that for both groups the most common means by which businesses and organizations prefer to be informed about local food options is through direct communication with growers and harvesters (60%+). The use of social media and/or producer newsletters ranked as the second most common preferred means of being informed about local food options for both groups (29%). A higher proportion of urban based businesses / organizations identified communication with food distributors / wholesalers as a preferred option compared to businesses / organizations based in smaller communities (23% vs. 12%).

When we examine the preferred means for being informed about local food options by the type of business / organization we find that direct communication with growers / harvesters is the most common preferred approach in each of the four areas of food demand (52% to 69%). The use of social media and/or producer newsletters ranked as the second most common preferred means of being informed about local food options in each of the four areas of food demand (food programs – 52%, food services – 32%, food retail – 20%, food processing – 17%).

Table 13: Most preferred means by which businesses / organizations want to be informed about local food options by type of business / organization

Most preferred ways for being engaged / informed about local food options	Food processing (n=29)		Food programs (n=27)		Food retail (n=49)		Food service (n=82)	
	#	%	#	%	#	%	#	%
Direct communication with growers and harvesters	15	51.7%	17	63.0%	34	69.4%	53	64.6%
Through local producer networks / associations	3	10.3%	0	0.0%	4	8.2%	5	6.1%
Through producer newsletters / emails / social media	5	17.2%	14	51.9%	10	20.4%	26	31.7%
Through producer websites	2	6.9%	1	3.7%	5	10.2%	6	7.3%
Through food distributors / wholesalers providing information	5	17.2%	3	11.1%	6	12.2%	15	18.3%
Through food retailers providing information	2	6.9%	1	3.7%	2	4.1%	3	3.7%

Note: businesses/organizations were allowed to identify more than one approach.

3.2 What are the Pros & Cons of Local Food as Viewed by Businesses / Organizations?

What Motivates Businesses / Organizations to Source Locally Grown Food?
Businesses and organizations were asked to identify the key factors that motivate them to procure locally grown / harvested foods. The most common reason identified across all three Districts (60%+) is the view that procuring locally grown food benefits/contributes to the local economy. The second most common reason identified across all three Districts is that locally grown / harvested foods are higher quality (39% - 51%). Customer interest / demand for locally grown / harvested foods was also a key motivator for about 20% of the businesses and organizations across all three Districts.

Table 14: Key motivations for businesses / organizations to procure locally grown / harvested food by location of business / organization

Motivation for procuring locally grown / harvested food items	Algoma (n=75)		Manitoulin (n=51)		Sudbury (n=61)	
	#	%	#	%	#	%
Higher quality food	30	40.0%	26	51.0%	24	39.3%
Contributes to the local economy	47	62.7%	33	64.7%	49	80.3%
Animal welfare	2	2.7%	2	3.9%	3	4.9%
Environmental health	2	2.7%	6	11.8%	13	21.3%
Marketing tool	11	14.7%	6	11.8%	10	16.4%
Distinguishes the business	7	9.3%	4	7.8%	13	21.3%
Customers demand local food	14	18.7%	11	21.6%	12	19.7%
Getting to know farmers	6	8.0%	6	11.8%	11	18.0%

Note: businesses/organizations were allowed to identify more than one motivating factor.

Representatives from Manitoulin District provided additional commentary on what motivates them to procure locally grown / harvested foods:

Food retail representatives

- *We want to support the local producers for supporting us as our customers.*
- *Some of our customers are interested in buying locally grown and we try to source locally when it's in season.*
- *Buying local is a form of showing good will. People are interested in supporting their local community (vs. buying from places from down south). It's unfortunate that so much of what's grown locally ends up being shipped down south to be processed and then shipped back up to the north.*
- *There's a lot of grassroots support for buying local. Businesses helping businesses.*
- *Food is fresher and higher quality if it's produced closer to home. Locally grown food also has less environmental impact (i.e. reduces the transportation of the food),*
- *It's important to try and keep as much income within the community – if the money goes down to Toronto, it doesn't really come back to you and your community.*

Food service representatives

- *Locally grown food is better quality and healthier. It tastes better which makes my cooking easier when I have quality ingredients. Locally grown is also more ecologically sound and supports local businesses.*
- *Our customers/clients request locally grown on the menu. They want as much food from their own land as they can possibly get.*

- *Local food is the healthiest option – it's grown in your environment, with local water, air, and soil.*
- *I believe in keeping things close to home and supporting local farmers. I like to keep my money in the community.*
- *I believe in eating healthy food and local food is the healthier option. As a gardener, I know how good the food is when it's fresh. The quality assurance is key – I've purchased produce from the big wholesalers before and I have issues with the quality.*
- *It's important for me to know where the food comes from, including the extent of pesticide use. I also value supporting local farm families.*
- *Locally grown has the best flavor.*
- *Locally grown = the greatest freshness and it contributes to the local economy.*
- *It's important to me to know where the food has been grown and how it's been grown (e.g. herbicide / pesticide free).*

Food program representatives

- *It's important to know that local food is available in the region. It's important to have a network that can help to identify and source locally grown.*
- *The community is good to us and supports us – we feel obligated to support local growers as much as we can.*
- *Buying close to home is best but for some of the more remote communities it can be difficult / expensive to transport food to the community.*
- *Sourcing local food can be cost efficient less costly than non-local options. It's also healthier and an important part of traditional practices.*

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that for both groups the most common reason identified is the view that procuring locally grown food benefits/contributes to the local economy (75% vs. 66%). The second most common reason identified by 43% of the urban based and rural based businesses / organizations is that locally grown / harvested foods are higher quality. Customer interest / demand for locally grown / harvested foods was also a key motivator for about 20% of urban based and rural based businesses and organizations. A higher proportion of urban based businesses / organizations emphasized the importance of procuring locally grown as a means to distinguish their brand (19% vs. 10%) and a higher proportion of urban based businesses / organizations also noted the importance of getting to know local farmers as a key motivator (19% vs 9%).

When we examine the key motivations for procuring locally grown foods by the type of business / organization we find that the most common reason identified across all four areas of food demand is the view that procuring locally grown food benefits/contributes to the local economy. This is especially the case for food processing, food retail and food service establishments (70% or more).

The second most common reason identified by food services, food retail and food program representatives is that locally grown / harvested foods are higher quality. This is especially the case for food services and food retail where 54% and 43% of the establishments identified this as a key motivator. The second most common reason identified by food processing representatives is that they use locally grown as a marketing tool in their operation (38%).

Customer interest / demand for locally grown / harvested foods was a key motivator for about 39% of the food retail businesses and 24% of the food processing businesses.

Table 15: Key motivations for businesses / organizations to procure locally grown / harvested foods by type of business / organization

Motivation for procuring locally grown / harvested food items	Food processing (n=29)		Food programs (n=27)		Food retail (n=49)		Food service (n=82)	
	#	%	#	%	#	%	#	%
Higher quality	6	20.7%	9	33.3%	21	42.9%	44	53.7%
Contributes to the local economy	23	79.3%	12	44.4%	37	75.5%	57	69.5%
Animal welfare	3	10.3%	1	3.7%	2	4.1%	1	1.2%
Environmental health	5	17.2%	3	11.1%	8	16.3%	5	6.1%
Marketing tool	11	37.9%	1	3.7%	3	6.1%	12	14.6%
Distinguishes the business	8	27.6%	2	7.4%	5	10.2%	9	11.0%
Customers demand local food	7	24.1%	2	7.4%	19	38.8%	9	11.0%
Getting to know farmers	5	17.2%	4	14.8%	6	12.2%	8	9.8%

Note: businesses/organizations were allowed to identify more than one motivating factor.

What Discourages Businesses / Organizations from Sourcing Locally Grown Food?

Businesses and organizations were asked to identify the key challenges that they've experienced or that they associate with procuring locally grown / harvested foods. The most common challenge identified across all three Districts (40% - 50%) is the view that locally produced foods are more expensive than non-local options. Insufficient volumes and inconsistency of availability of locally produced foods ranked as the second or third most common challenges identified across all three Districts (21% - 38%). Difficulties and challenges associated with delivery were identified as the next most common challenge across all three Districts (17% - 22%). Almost a third of the businesses / organizations in Sudbury identified issues with the consistency of local food quality as a key challenge compared to 15% and 8% of the businesses / organizations in Algoma and Manitoulin respectively.

Table 16: Key challenges that businesses / organizations experience and/or associate with procuring locally grown / harvested foods by location of business / organization

Challenges experienced / associated with procuring locally grown / harvested food items	Algoma (n=75)		Manitoulin (n=51)		Sudbury (n=61)	
	#	%	#	%	#	%
Not enough overall volume	25	33.3%	12	23.5%	23	37.7%
Seasonality (inconsistent availability)	16	21.3%	13	25.5%	23	37.7%
Inconsistent quality	11	14.7%	4	7.8%	20	32.8%
Reliability issues	14	18.7%	6	11.8%	12	19.7%
High cost	32	42.7%	23	45.1%	31	50.8%
Difficulties / challenges with ordering	9	12.0%	3	5.9%	6	9.8%
Difficulties / challenges with delivery	13	17.3%	11	21.6%	11	18.0%
Have to order through head office	8	10.7%	1	2.0%	3	4.9%
Billing, payment, invoicing complications	3	4.0%	0	0.0%	2	3.3%
Liability concerns	8	10.7%	2	3.9%	4	6.6%

Note: businesses/organizations were allowed to identify more than one challenging factor.

Representatives from Manitoulin District provided additional commentary on the challenges that they experience / associate with procuring locally grown / harvested foods:

Food processor representatives

- *Some of the things I want aren't produced / grown in the area or in very limited quantities (e.g. locally milled flour, northern spy apples).*
- *Many of the food ingredients I need are not available locally.*
- *There isn't sufficient demand in the area for someone to start milling local flour.*
- *Need greater promotion to raise awareness of what locally grown / harvested foods are available.*

Food retail representatives

- *I prefer pesticide free / non-GMO products. I know that it's hard to stay 100% organic but people should make the effort. I want to promote healthy, natural, products in my business.*
- *We need local producers to make a strong commitment to supplying us with their freshest, best product… some producers run road side stands and the best product is sold at the stand and not to the wholesaler. Producers need to appreciate differences between retail and wholesale pricing – I'm willing to buy larger quantities but there needs to be more competitive pricing from producers.*
- *Transporting and coordinating local food delivery is a big challenge.*
- *Cost is the biggest issue – we need to have wholesale prices. Ideally, each person in the deal should equally benefit. We cannot go to an individual farm that doesn't have a loading dock.*
- *The short growing season is a challenge. In the winter it's hard to find locally grown produce – although there are a couple local greenhouses, it's not possible for these producers to keep up with the supply they need.*
- *There isn't a set distribution network for locally grown foods and so we need to travel out to the producer or the producer needs to bring it to us. It can be costly having to run single farm pick-ups – and it's not efficient for small volumes.*

Food service representatives

- *We require all food used in our operation to be graded and inspected. Inspection requirements are very strict and it's not possible to simply go and buy food at the local market. It all needs to have gone through the complete inspection process.*
- *Not knowing where to find locally grown food is a challenge. More information is needed on where the local producers are located, what they are producing, and where it can be purchased… there seems to be very few local producers but perhaps there are more and they need better promotion.*
- *Seasonality is an issue – there is limited supply various times of the year.*
- *Transportation is an issue = the distance to reach a farm -- and the distances between farms -- makes it costly and time consuming to access locally grown.*
- *The distance required to travel to/from the farm is significant. It takes me 30 min. each direction twice a week.*
- *The quantity of local food availability is a serious challenge… we need a consistent supply. We also have limitations on how much time we can dedicate to running out to pick up the locally grown food – it's simply not realistic or cost efficient to spend a day*

picking up locally grown food. Cost considerations, such as time/money spent sourcing local products, are important for restaurants.

- *Consistent supply is a big issue for our business… local lettuce, for example, has many different flavours. Certain lettuces are bitter, and to eliminate the bitterness, you need to modify your dressing. When we have to switch to a new type of lettuce because of lack of availability, we have to change their dressing recipe. We need consistency in the dishes that we serve. People return to the restaurant hoping for the same dishes and we can't have things constantly changing.*
- *Our food ordering for catering events is sporadic… we have to be able to get food quickly and from places that can support the volume we need on short notice.*

Food program representatives

- *It's very time consuming to travel out to some farms to pick-up food – when farmers require food to be picked up. It requires additional planning and they don't always have the resources / time to do this.*
- *It can be a two-hour drive or more to get produce.*
- *Our program has very limited budget and the local food option is often more expensive than non-local options.*
- *Sustained, secure funding is an issue – at the moment we have good funding but it's difficult to say how long it will continue.*
- *We get plenty of offers for locally grown food donations but unfortunately the quantities are sometimes too high for the storage capacity they have.*

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that for both groups the most common challenge identified is the view that locally produced foods are more expensive than non-local options but the proportion of urban based businesses / organizations holding this view is considerably higher (57% vs. 40%). The second and third most common challenges identified by both the urban based and rural based businesses / organizations is the insufficient volumes and inconsistent availability of locally produced foods. Once again, we find the proportion of urban based businesses / organizations holding this view is higher than those based in smaller communities (45% and 25% vs. 25% and 24%). Approximately 26% of the urban based businesses / organizations identified issues with the consistency of local food quality as a key challenge compared to 12% of the businesses / organizations in smaller communities. A slightly higher percentage of rural based businesses / organizations identified issues with product delivery as a key challenge compared to urban based businesses / organizations (21% vs. 15%).

When we examine the key challenges experienced or associated with procuring locally grown / harvested foods by the type of business / organization we find that the most common challenge identified across three of the four areas – food processing, food retail, food services – is the view that locally produced foods are more expensive than non-local options (43% - 53%).

The second and third most common challenges identified by food processors is the insufficient volumes of locally produced food (38%) and reliability of these products being available (31%).

The second and third most common challenges identified by food retailers is the insufficient volumes of locally produced food (41%) and issues with the consistency of local food quality (29%).

The second and third most common challenges identified by food service establishments is the issue of seasonality / inconsistent availability of locally produced foods (37%) and insufficient volumes of locally produced food (31%).

The most common challenge that food programs experience with sourcing locally grown / harvested foods is the issue of product delivery (44%) which in some cases is further complicated by the limited storage capacity of some organizations. The second most common challenge identified by food programs is the view that that locally produced foods are more expensive than non-local options (37%).

Table 17: Key challenges that businesses / organizations experience and/or associate with procuring locally grown / harvested foods by type of business / organization

Challenges experienced / associated with procuring locally grown / harvested food items	Food processing (n=29)		Food programs (n=27)		Food retail (n=49)		Food service (n=82)	
	#	%	#	%	#	%	#	%
Not enough overall volume	11	37.9%	4	14.8%	20	40.8%	25	30.5%
Seasonality (inconsistent availability)	5	17.2%	6	22.2%	11	22.4%	30	36.6%
Inconsistent quality	5	17.2%	3	11.1%	14	28.6%	13	15.9%
Reliability issues	9	31.0%	2	7.4%	10	20.4%	11	13.4%
High cost	15	51.7%	10	37.0%	26	53.1%	35	42.7%
Difficulties / challenges with ordering	1	3.4%	3	11.1%	4	8.2%	10	12.2%
Difficulties / challenges with delivery	2	6.9%	12	44.4%	6	12.2%	15	18.3%
Have to order through head office	0	0.0%	1	3.7%	8	16.3%	3	3.7%
Billing, payment, invoicing complications	0	0.0%	1	3.7%	2	4.1%	2	2.4%
Liability concerns	0	0.0%	2	7.4%	6	12.2%	6	7.3%

Note: businesses/organizations were allowed to identify more than one challenging factor.

What Changes or Improvements are of Interest to Businesses / Organizations?
Manitoulin District representatives offered their suggestions on possible actions that would further enable their ability to procure locally grown or harvested foods.

Food processor representatives

- *It would great to have a local flour mill operator… but there may not be enough demand to make this viable… I would like to see someone explore it.*
- *More needs to be done in promoting who the local producers are and what they produce, where they're located, and any additional services they offer such as delivery.*

Food retail representatives

- *Producers need more assistance with marketing their products to retailers, food restaurants, etc. There needs to be a structured way for retailers to connect with growers/producers – for example, being a part of a local food network/membership.*
- *There needs to be some sort of handbook (or catalogue or map), with a list of all available products.*
- *We need to have a list / inventory of the different producers in the area and what they are growing.*
- *Retailers need more information on who the local producers are and what they're producing… we know that this can change from year to year, so this information needs to be updated and kept current.*

- *Pricing needs to be competitive… in retail, some customers might be willing to pay a slightly higher price for locally grown but many customers are very price sensitive.*
- *It's important for local growers to provide consistency… in the availability of their products and the quality. Unfortunately, with local growers the supply is hit and miss… sometimes we're only able to buy local once a month or less.*
- *There needs to be some sort of co-op / central distribution facility with a dock for loading trucks.*

Food service representatives

- *There needs to be a greater volume of local production… for example, there's not enough bacon to meet our needs so we have to source it from elsewhere. We could also use more bell peppers… it would be great to have greenhouses in Manitoulin so that we could get the produce we want year-round.*
- *Locally grown food needs to be more convenient to access – or it needs to be delivered.*
- *Producers need to ensure that their quality / food safety standards are maintained. Places like nursing homes have very specific needs and requirements and it might be helpful to provide producers with more information on these requirements.*
- *There needs to be greater availability… we don't have market gardeners who produce in large quantities.*
- *Producers need to provide an assurance that they can deliver on the amounts that we need supplied.*
- *Locally grown foods need to be reasonably priced – comparable to what retailers / wholesalers can offer.*
- *There needs to be greater consistency in the availability of locally grown food and it needs to be delivered to us.*
- *A system of delivery is needed… it needs to be routine (e.g. once a week) and dependable.*
- *Some kind of information portal/website is needed where buyers can easily find the local growers and gain a sense of what's available… especially important for new business operators who are new to the area.*
- *There needs to be greater access to locally grown food. There is a local farmer's market Fridays through Sundays, but the farmers only bring a handful of items… this is not enough to meet my needs. Markets don't work for supplying small businesses. There needs to be a central warehouse / distribution system that farmers can sell their products through (or work with existing wholesalers / distributors to get them to take on more local food products).*
- *The farmers' market needs to expand the operating hours… make it more accessible.*
- *There needs to be more farmer's markets – places to buy the food.*

Food program representatives

- *A food co-op could be helpful… A few places are doing co-ops – usually in larger cities but perhaps something that could be replicated in the Manitoulin area.*
- *Cost and transportation are the main issues for their community members… it needs to be affordable for members to access the food.*
- *Some form of food pickup/delivery system is needed e.g. a vehicle that could travel to the farms and make the pickups.*
- *Storage and delivery are key issues to be addressed.*
- *Our operating hours really constrain our ability to serve the community – we are only open a few hours once a week. Greater financial assistance would help us to serve the community better (e.g. improved accessibility and distribute food to a larger area).*

3.3 What Food Items are Businesses / Organizations Buying?

Introductory Notes for Interpreting the Data in Sections 3.3.1 to 3.3.4

As part of the key informant interview process, businesses and organizations were asked to share details on a select few food items that were of key interest to them. For each item that they identified they were asked to indicate how much of the item they procured annually (with a breakdown by the local and non-local quantities) and other details that were important to them (e.g. delivery preferences, fresh vs. processed, quality standards, packaging, etc.). Key informants were also asked to comment on their willingness to pay more for locally grown foods (food grown/harvested in the region).

Any reference made to locally sourced food items in the following sections of the report is inclusive of the Algoma / Manitoulin / Sudbury area, unless stated otherwise.

It is important to note that in some cases key informants reported on food items that they purchased locally (e.g. from a local retailer / wholesaler / processor) but they were not able to confirm if the items were produced / harvested locally.

Also note that some key informants provided more details on the above questions than others (depending on their level of interest in the study, the amount of time they could commit to the interview, their familiarity with products being procured) and as result some of the food profiles are more detailed than others.

For reporting purposes, we have structured the results by the four areas of food demand: food services, food retail, food processing and food programs. Within each of these sections we have broken out the results by categories including vegetables, fruit/berries, proteins (meat/fish), dairy, eggs, grains, and other food items as applicable. The tabulated results in this report are for **Manitoulin District only**. Interested stakeholders are encouraged to review the separate reports that were prepared for Algoma and Sudbury to gain a fuller picture of the local food interests across the region. A separate, stand alone catalogue (Excel data file) has been prepared as part of this project which interested stakeholders can review in detail to understand local food interests at the level of the individual business / organization.

Note on weights and volumes – During interviews with local businesses and organizations, respondents were invited to use the weight/volume measures that they were most familiar with (i.e. imperial vs. metric and/or more generic measurements such as boxes, crates, pallets, etc.). Measurements were then converted to metric standards during the data cleaning/analysis phase as appropriate. In those instances where non-metric units were provided by the respondent during the interview and the researchers were unable to identify a weight or volume equivalent (measurements given in boxes or bags for example) the unit measure provided by the respondent has been reported on instead – as seen in the following tables throughout the result section of the report.

3.3.1 Food Services

Representatives from the food service industry were invited to participate in a phone interview to discuss their local food procurement practices. In Manitoulin, a total of 22 food service respondents participated in this study. The food categories identified by those in the Manitoulin Food Service industry were vegetables, fruits and berries, proteins, dairy products, eggs, grains and 'other' products (i.e. maple syrup, honey, and local mushrooms). The following subsections provide a summary of the primary food items identified by those in the food service industry – highlighting food products sourced in the largest quantities and providing high-level details on the preferred processed condition, delivery, and price of these items and their interest in procuring more of these food items locally.

Vegetables

Regarding the procurement of local vegetables, food service representatives sourced potatoes, tomatoes, carrots, lettuce, and onions in the largest quantities.

Potatoes make up the largest vegetable item with over 37,800 kg sourced annually (see table 18). Of that amount only 1,500 kg was reported to have been sourced locally. Food services typically had potatoes delivered directly to the restaurant by a producer or wholesaler (5 out of 6), fresh and unprocessed (4 out of 6) once or twice a week (5 out of 6). Out of the six interview respondents, four said that they source potatoes seasonally with the remaining two saying that they use potatoes year-round. When asked about price, five out of the six respondents said that they would be willing to pay more for local potatoes, with one saying that they would be willing to pay up to 10% more and two saying up to 20% more.

Tomatoes were the second largest vegetable product sourced by food services with respondents reportedly purchasing over 4,000 kg of tomatoes a year – 3,300 kg of which was purchased locally (see table 18). Most of the interviewees said that they primarily purchase tomatoes seasonally (8 out of 10) with two saying that they procure tomatoes year-round. Deliveries typically took place once or twice a week (9 out of 10) while the tomatoes were in season. All the interviewees said that they purchase tomatoes fresh and unprocessed. As with the potatoes, most of the respondents expressed a preference for the tomatoes to be delivered (7 out of 10) however three food service interviewees said that they are willing to pick up this product from the producer. Nearly all the respondents (9 out of 10) said that they would be willing to pay more for local tomatoes (under the right circumstances) with two saying they'd be willing to pay up to 10% more, one saying up to 20% more, and 4 saying 30% or higher.

Carrots were the third largest vegetable product sourced by foods services who reported purchasing over 3,600 kg every year. However, at 220 kg, only a small amount was purchased locally (see table 18). This product was also sourced seasonally by most food service respondents (3 out of 4). Interviewees expressed a preference for fresh and unprocessed carrots to be delivered several times a week (3 out of 4) – with two respondents saying that they are willing to pick up carrots from the producer. All but one respondent said that they would be willing to pay more for local carrots (3 out of 4), with respondents saying that they'd be willing to pay up to 10% and up to 20% respectively (2 out of 4).

At 2,900 kg, lettuce was the fourth largest vegetable product mentioned by interviewees – none of which was purchased locally (see table 18). Out of the nine interviewees who spoke to this product, six said that they source lettuce seasonally. Most of the respondents preferred lettuce delivered directly to the restaurant (7 out of 9) and nearly all ordered lettuce 1-2 times a week (8 out of 9). Food services indicated a preference for fresh and unprocessed (8 out of 9) or fresh

and pre-washed (2 out of 9) lettuce. When asked if they would be willing to pay more for local lettuce, five out of nine said that they would, with three indicating a willingness to pay up to 10% more and two saying 20% or more. In addition, nearly all the interviewees said that they would be willing to switch to a local source for lettuce (8 out of 9) under the right conditions.

Onions were the fifth largest vegetable item sourced, with respondents purchasing over 2,000 kg of onions every year (see table 18). Respondents typically purchase onions seasonally (3 out of 4) from a wholesaler (4 out of 4). When asked about delivery, all said that they have their onions delivered directly to them 1-2 times a week. When asked about price, three said they would be willing to pay more for locally produced onions with one saying that they'd be willing to pay up to 10% more and two saying up to 20% more. All interviewees said that they would be interested in switching to a local source for their onions under the right circumstances.

Table 18: Amount of Vegetables Used by Food Services (n=41)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Potatoes	37,878	1,534	36,344	Kg
Tomatoes	4,187	3,305	882	Kg
Carrots	3,613	220	3,392	Kg
Lettuce	2,963	1,017	1,946	Kg
Onions	2,073	-	2,073	Kg
Cauliflower	1,132	-	1,132	Kg
Beans	707	707	-	Kg
Mixed Greens	454	-	454	Kg
Squash	294	294	-	Kg
Corn	104	104	-	Kg
Bell peppers	88	-	88	Kg
Cucumbers	72	65	7	Kg
Mushrooms	29	-	29	Kg
Mushrooms	2	0	2	Boxes
Rhubarb	25	25	-	Kg

Food Standard & Delivery Preferences (All Vegetable Summary)

This section highlights the food standard and delivery preferences for all vegetable products sourced by food services.

Food standard preferences – Food service respondents identified having the proper food safety certification as a main food standard preference (16 out of 41 products[27]), followed by products that were unblemished/regular shaped or of a certain grade (10 out of 41), and organic certified produce (6 out of 41). A few interviewees also indicated a preference for greenhouse grown items (cucumbers, tomatoes, and squash) while others preferred outdoor crops (potatoes, lettuce, and tomatoes).

[27] This number relates to the total number of produce items reported on rather than the number of interviewees, as interviewees were given the opportunity to report on multiple products – each with their own delivery preferences. These numbers therefore represent a single commodity datapoint rather than referencing the number of respondents interviewed.

Delivery preferences – The majority of food service representatives indicated a preference for produce to be delivered directly to the restaurant, either by the producer or a wholesaler (32 out of 41 datapoints), however there were some who indicated that they prefer to pick up the produce directly from the producer (12 out of 41). Some of the respondents talked about the benefit of picking up their products from the producer, citing relationship building and being able to relay to their customer base where their produce was coming from as an added benefit to their business.

Fruits and Berries

At 879 kg sourced annually, food service representatives identified apples as the primary fruit item that they are currently sourcing locally. Of this amount, just over 300 kg of apples came from a local source (see table 19). All three respondents who spoke to this product said that they source apples year-round with orders delivered directly to the store 1-2 times a week (3 out of 3). All the respondents purchased apples that were fresh and unprocessed and identified fruits that were unblemished/regular shaped (1 out of 3) and food safety certified (2 out of 3) as primary food standard preferences. In addition, one respondent noted that they prefer products that are grown with limited pesticide use. When asked if they would be interested in sourcing more local apples, all interviewees said yes with two saying that they'd be wiling to pay a premium price for a local product.

Table 19: Amount of Fruit Sourced by Food Services (n=6)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Apple	879	303	576	Kg
Raspberry	306	-	306	Pints
Strawberry	306	-	306	Pints
Blueberry	18	-	18	Pints

Food Standard & Delivery Preferences (All Fruit Summary)

This section highlights the food standard and delivery preferences for all fruit/berry products sourced by food services.

Food standard preferences – All food service respondents purchased their fruit/berry products fresh and unprocessed. When asked about the food standard preferences that were most important to them, interviewees referenced 'unblemished/regular shaped foods' (4 out of 6) and 'certified through a recognized food safety program' (2 out of 6).

Delivery preferences – Food service respondents typically preferred to order their fruit/berry products from a wholesaler who delivers directly to the restaurant (5 out of 6) however a couple of respondents also expressed a willingness to pick up products directly from the producer (2 out of 6). Delivery frequencies were fairly consistent with all respondents receiving fruit/berry orders 1-2 times a week (6 out of 6).

Proteins

Regarding the procurement of proteins, food service respondents identified beef, fish, and pork as the top three protein products sourced annually (see table 20). At over 5,800 kg sourced annually, beef was the largest protein product referenced by food services. Of the total amount sourced, a majority – 4,000 kg – was sourced locally. Half of the businesses ordered beef year-round (6 out of 11) while the other half sourced beef products seasonally (5 out of 11). Beef cuts were typically delivered by producers/wholesalers once a week (8 out of 11) however a few interviewees also indicated that they prefer to pick up their beef products from the producer (4 out of 11). Beef cuts were typically order in fresh and bagged/vacuum sealed (7 out of 11) or wrapped in butchers' paper (2 out of 11). When asked about price, nine respondents said that they would be willing to pay a premium price for local beef[28] and eight respondents said that they would be interested in sourcing more of their beef locally.

Fish was the second largest protein item sourced by food services, with respondents purchasing over 2,400 kg of fish annually, nearly all of which was sourced locally (see table 20). Fish was mostly procured year-round by food services (5 out of 7) who reported purchasing fish both fresh (3 out of 7) and frozen (4 out of 7). Respondents specified a preference for cleaned (i.e. boneless) fish fillets. Delivery preferences varied with half of respondents saying that they prefer direct delivery from a producer or wholesaler (4 out of 7) and half saying that they prefer to pick up the fish directly from the producer (3 out of 7). Although the majority of fish reported on was purchased locally, only two interviewees said that they would be interested in sourcing more local fish with one saying that they'd be willing to pay up to 10% more for a local product and the other saying that it would have to be price competitive.

Pork was the third largest protein product sourced by food services at 2,300 kg sourced annually – 670 kg of which came from a local source (see table 20). Food services procured pork both seasonally (2 out of 5) and year-round (3 out of five) with half saying that they prefer to have the pork delivered (2 out of 5) and half saying that they prefer to visit the producer to pick it up (3 out of five). Pork was purchased both fresh (2 out of 5) and frozen (3 out of 5) with one interviewee saying that they purchase cured pork. Quality/grade of meat (3 out of 5) and food safety certification (3 out of 5) were both identified as important food standard preferences with one respondent saying that they prefer free range and grass-fed animals. When asked about sourcing more local pork four out of the five respondents indicated that 'yes' they would be interested in switching to a local source and that they'd be willing to pay a premium price for local pork.[29]

Table 20: Amount of Proteins Used by Food Services (n=28)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Beef	5,803	4,008	1,795	Kg
Fish[a]	2,422	1,986	435	Kg
Pork	2,323	670	1,653	Kg
Chicken	662	327	335	Kg
Chicken	150	150	-	Whole Animal
Lamb/mutton	6	6	-	Whole Animal
Lamb/mutton	5	5	-	Kg

[a]*wild and/or cage raised*

[28] Up to 10% more (5 out of 11); up to 20% more (3 out of 11); and up to 30% more (1 out of 11).
[29] Up to 10% more (2 out of 5) & up to 20% more (2 out of 5)

Food Standard & Delivery Preferences (All Protein Summary)

This section highlights the food standard and delivery preferences for all protein products sourced by food services.

Food standard preferences – Protein products were most often sourced fresh (14 out of 28) or frozen (12 out of 28) with a few interviewees reporting 'cured' (1 out of 28) or 'smoked' (1 out of 28) products. Regarding food standard preferences, food service respondents most often cited 'food safety certification' (21 out of 28 datapoints) as a primary food standard preference, followed by the 'quality or grade of meat' (18 out of 28) and 'animals raised in a certain way' (i.e. grass fed, free range, wild (fish)) (6 out of 28). Only one interviewee cited an organic certification as a preference (beef).

Regarding the types of processed meat purchased by food services, respondents indicated purchasing the following cuts of meat:

Beef	**Fish**	**Pork**	**Chicken**	**Lamb**
Whole animal (various cuts)	Whole fish	Whole Animal (various cuts)	Whole bird	Whole Animal
Roast Beef	Fillets	Pork loin		
Hamburger		Pork chops		
Ground beef		Sausage		

Delivery preferences – When asked about their delivery preferences, food service interviewees most often cited direct delivery either by a wholesaler (12 out of 28) or the producer (5 out of 28), however a number of interviewees also stated a preference for visiting the producer to pick up protein products (12 out of 28). Products that food service providers were willing to pick up included: beef, fish, pork, chicken, and lamb.

Dairy Products

Regarding the procurement of dairy products, food service providers identified ice-cream, milk, cheese, cream, and butter as the main dairy products sourced (see table 21). Ice-cream was sourced in the largest quantity with interviewees reporting a total of 31,900 liters sourced annually. This quantity was used by one respondent who sourced ice-cream year-round. Deliveries were made once a week in 11.5-liter tubs. Although this respondent wasn't sourcing any of their ice-cream locally at the time of the interview, they did express an interest in sourcing local ice-cream, indicating that they'd be willing to pay up to 10% more for a local product.

Fluid milk was the second largest dairy product sourced by food services, who reported sourcing over 5,600 liters of milk annually. White milk was sourced by three food service providers, two of which reported sourcing milk year-round. All interviewees indicated a preference for milk delivered directly to the restaurant, 1-2 times a week, packaged in 4 liter-bags (3 out of 3). While none of the interviewees were sourcing milk locally, all three said that they would be interested in switching to a local source under the right circumstances. When asked about price two said that the cost would have to be comparable while one said that they'd be willing to pay up to 30% more for locally produced milk.

Cheese was the third largest dairy product sourced by food services at over 3,200 kg sourced annually – 1,400 kg of which came from a local source (see table 21). Cheese was sourced year-round by two interview respondents, both of which indicated a need for cheese products to

be delivered directly to the restaurant (either by a producer or wholesaler), once a week. When asked about sourcing more local cheese both respondents indicated their interest in sourcing more local cheese with both saying that they'd be willing to pay up to 10% more for a locally produced product.

Table 21: Amount of Dairy Sourced by Food Services (n=8)

Dairy	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Ice cream	31,913	-	31,913	Liters
Milk	5,636	-	5,636	Liters
Cheese	3,272	1,400	1,872	Kg
Cream	144	-	144	Liters
Butter	136	136	-	Kg

Food Standard & Delivery Preferences (All Dairy Summary)

This section highlights the food standard and delivery preferences for all dairy products sourced by food services.

Food standard preferences – Regarding specific food standard preferences, all food service respondents indicated that their dairy products needed to be certified through a recognised food safety program (8 out of 8).

Delivery preferences – All of the food service respondents indicated a preference for dairy products to be delivered directly to the restaurant, either by a producer or wholesaler (8 out of 8), with delivery frequencies varied from once a week (7 out of 8) to several times a week (1 out of 8).

Eggs

Food service respondents identified whole chicken eggs, liquid eggs, and hardboiled eggs as main egg products sourced throughout the year. Whole chicken eggs were sourced in the largest quantity, with respondents reporting over 4,300 dozen eggs sourced annually – over 2,100 dozen of which was sourced locally (see table 22). This quantity was shared across nine different food service businesses who reported sourcing eggs both seasonally (2 out of 9) and year-round (7 out of 9). The majority of respondents indicated a preference to have their eggs delivered (8 out of 9) with one reporting that they visit the producer directly to pick up their egg order. Orders were typically placed 1-2 times a week (9 out of 9) with respondents ordering anywhere between 1 dozen to 15 dozen eggs at a time. Interviewees also expressed a preference for medium (3 out of 9) to large (6 out of 9) eggs with four saying that they prefer white eggs, one expressing a preference for brown, and four saying they have no colour preference. When asked if they would be interested in sourcing more local eggs seven respondents said 'yes' with five saying that they'd be willing to pay a premium price[30] for a local product.

[30] Up to 10% more (3 out of 9); and up to 20% more (1 out of 9)

Table 22: Amount of Eggs Sourced by Food Services (n=10)

Eggs	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Chicken eggs	4,311	2,174	2,137	Dozen
Liquid Egg	720	-	720	Kg
Hard Boiled Eggs	576	-	576	Dozen

Food Standard & Delivery Preferences (All Egg Summary)

This section highlights the food standard and delivery preferences for all egg products sourced by food services.

Food standard preferences – Regarding specific food standard preferences, nearly all interviewees said that having the proper food safety certification was important to them (9 out of 10 products). Most of the respondents were more interested in the availability of local products than they were in specific food standard preferences, with seven out of 10 saying that they would be interested in sourcing more eggs locally. One respondent noted the importance of keeping the prices for local products reasonable, saying *"The main things is that, as a nursing home, they're only allotted a set dollar amount per resident per day for food and beverages. Purchasing larger volumes makes it easier to budget. It would be nice to have greater availability of local foods because it is healthier."*

Delivery preferences – Most of the respondents indicated sourcing egg products year-round (9 out of 11) and expressed a preference to have products delivered to them (8 out of 11) 1-2 times a week (9 out of 11).

Grains, Oilseeds and Pulse Crops

Regarding the procurement of grain, oilseeds, and pulse crops, food services identified Ancient Grains as a primary grain product. One respondent spoke to their procurement of Ancient Grains, indicating that they purchase 41 kg of grain annually – of which 24 kg was sourced locally. This product was sourced year-round and delivered by a wholesaler bi-annually. Regarding specific food standard preferences, the interviewee said that they prefer the product to be as natural as possible, purchasing a whole grain product. When asked if they would be interested in sourcing more grains locally, this interviewee said 'yes' however the cost of local grains would have to be price competitive for them to consider switching suppliers.

Other Products

Food service representatives were given the opportunity to identify any 'other' products not yet discussed during the interview. Interviewees identified maple syrup, honey, and local mushrooms as primary 'other' products sourced throughout the year. Maple syrup was the largest 'other' product sourced by food services at 200 liters purchased annually – all of which came from a local source (see table 23). This quantity was used by one respondent who indicated sourcing maple syrup year-round. Orders are placed through a local producer who delivers the product directly to them, once a year. The maple syrup is delivered bottled and boxed and lasts them throughout the year. When asked about price this interviewee said that they are already paying a premium price for maple syrup however they couldn't say how much. Likewise, this particular respondent wasn't interested in sourcing any more maple syrup as they are currently sourcing all that they need.

Honey was the second largest 'other' product mentioned by respondents who indicated sourcing 49 liters annually – with 10 liters sourced locally (see table 23). This quantity is used between

two respondents who indicated sourcing honey both seasonally and year-round. Both respondents said that they have their honey delivered directly from the producer with one receiving weekly deliveries and the other ordering honey once a year. Having the correct food safety certification was also mentioned by both respondents as an important food standard consideration. When asked if they would be interested in sourcing more local honey one said 'yes' – and that they'd be willing to pay a premium price for locally produced honey – while the other indicated that they are already sourcing all that they need.

Local mushrooms were the third largest 'other' product mentioned by food service representatives, with one respondent indicating that they purchase 2 small boxes of local mushrooms at the local farmers market every year (see table 23). Although they are only currently purchasing a small number of local mushrooms, this interviewee said that they would be interested in sourcing more mushrooms locally, but they can't get the quantity that they need. As a result, local mushrooms are purchased seasonally when they're available at the local farmers market. When asked if they would be willing to pay more for locally produced mushrooms the respondent said 'yes' indicating that they'd be willing to pay up to 30% more for a local product.

Table 23: Amount of Other Products Sourced by Food Services (n=4)

Other Products	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Maple syrup	200	200	-	Liters
Honey	49	10	39	Liters
Harvested mushrooms	2	0	2	Boxes[a]

[a] *Shoe box sized*

3.3.2 Food Retail

Representatives from the food retail industry were also invited to share information on their food procurement practices. A total of 13 Manitoulin retailers participated in this study, and identified the following primary food categories: vegetables, fruits and berries, proteins, eggs, and other products (i.e. honey & maple syrup). These items represent products that Manitoulin retailers are either currently sourcing locally or have an interest in procuring locally in the future. This section provides an overview of these food categories, focusing on food items sourced in the largest quantity, and providing high-level information on preferred process conditions, delivery, and price along with the respondent's interest in procuring these food items from a local source in the future.

Vegetables

Regarding the procurement of local vegetables: potatoes, cucumbers, carrots, and corn were the top vegetable items sourced by Manitoulin retailers.

Potatoes were the largest vegetable item with retailers sourcing a total of 1,035,119 annual kg and nearly 880,000 kg of potatoes from a local source. All three retailers said that they source potatoes year-round with two indicating that they have potato orders delivered directly to the store and one saying that they prefer to visit the producer to pick up their orders. Potatoes were delivered, fresh and unprocessed, in 4.5, 9, and 24 kg bags. All the retailers said that they would be interested in sourcing more local potatoes, and two said that they would be willing to pay up to 20% more for a local product.

Cucumbers were the second largest vegetable product sourced by retailers, who sourced over 7,000 kg annually – 4,200 kg of which was procured locally. Only one retailer reported on this item, saying that they purchase fresh and unprocessed cucumbers seasonally with orders coming in once a week. This retailer said that they prefer to visit the producer to pick up their order and that they would be interested in sourcing more locally. When asked about price this retailer said that they would be willing to pay up to 10% more for locally produced cucumbers.

Carrots were the third largest vegetable product sourced, with retailers procuring over 6,000 kg annually – over 5,500 kg of which came from a local source. Of the two retailers who source this product, one sourced carrots seasonally while the other sourced them year-round. Both ordered carrots that were fresh and unprocessed and identified unblemished/regular shaped and graded products as important food standard considerations. When asked about their delivery preferences both said that they order in carrots weekly with one opting to pick up their order from their producer while the other required direct delivery. Both retailers said that they would be interested in sourcing more local carrots under the right circumstances and one said that they would be willing to pay up to 20% more for a local product.

At nearly 2,700 kg sourced annually, corn was the fourth largest vegetable item sourced by retailers. None of this product was sourced locally however the retailer who spoke to this product said that they would be interested in sourcing local corn provided that they could get it for a comparable price. This retailer indicated that they source corn seasonally and that they have it delivered, fresh, to their store once a week.

Table 24: Amount of Vegetables Used by Food Retailers (n=15)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Potatoes	1,035,119	879,575	155,544	Kg
Cucumbers	7,075	4,245	2,830	Kg
Carrots	6,061	5,507	554	Kg
Corn	2,696	-	2,696	Kg
Onions	499	499	-	Kg
Tomatoes	385	385	-	Kg
Kale	198	198	-	Kg
Lettuce	120	-	120	Kg
Bell peppers	118	59	59	Kg
Beets	60	57	3	Kg
Beans	40	38	2	Kg
Spinach	21	4	18	Kg
Swiss Chard	18	17	1	Kg

Note: Broccoli, Tomatoes, and Corn were also mentioned by retailers however no quantities were given

Food Standard & Delivery Preferences (All Vegetable Summary)

This section highlights the food standard and delivery preferences for all vegetable products sourced by food retailers.

Food standard preferences – Nearly all the retailers purchased produce that was fresh and unprocessed (13 out of 15 products). Quality produce was important to all interviewees who specified 'food safety certified' as a primary food standard preference (8 out of 15 products)

followed by ‘unblemished, regular shaped foods’ (6 out of 15), ‘foods of a certain grade’ (5 out of 15), ‘certified organic’ (4 out of 15), and ‘produced as an outdoor field crop’ (2 out of 15).

Food delivery preferences – Most food retailers require produce to be delivered directly to their store by a producer or wholesaler (11 out of 15 products), however a few Manitoulin retailers mentioned picking up their produce from either a producer or wholesaler (4 out of 15). Delivery frequencies typically ranged from 1-2 times a week (12 out of 15) with a few smaller retailers scheduling deliveries twice a month (3 out of 15).

Fruits and Berries

Retailers identified strawberries and blueberries as the main berry products sourced throughout the year and reported sourcing 700 pints of strawberries and 420 pints of blueberries annually (see table 25). None of this product was sourced locally however the retailer who spoke to these products said that they would be interested in sourcing berries locally under the right circumstances. Currently, this retailer purchases fresh and unprocessed berries seasonally from wholesalers and require direct delivery several times a week. Quality was very important to this retailer who identified unblemished/regular shaped foods as a primary food standard preference. In the discussion around price the interviewee said that they would be willing to pay up to 10% more for a local product.

Table 25: Amount of Fruit Sourced by Food Retailers (n=2)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Strawberry	700	-	700	Pints
Blueberry	420	-	420	Pints

Proteins

Manitoulin retailers identified various packaged meats (i.e. chicken, pork, and bacon) as the main protein product sourced throughout the year. Retailers reported sourcing 2,500 packages of different meat products throughout the year with over 1,600 packages coming from a local source (see table 26). Retailers purchased proteins year-round, sourcing from both local producers and wholesalers who delivered directly to the store once a week. Due to the variety of different types of meat, retailers reported purchasing fresh, frozen, whole, and smoked meat products. When asked about price, one retailer reported that they would be willing to pay up to 30% more for local proteins, saying that they are *“definitely willing to pay a premium – local meat is our number one product in terms of quantity sold, and people who want high quality local meat are willing to pay a premium.”*

Table 26: Amount of Proteins Used by Food Retailers (n=4)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Packaged Meats[a]	2,500	1,625	875	Packages
Beef	567	567	-	Kg
Beef	50	50	-	Whole Animal
Farmed game[b]	270	270	-	Whole Animal

*[a]Chicken, pork, sausage, and bacon *note they don’t separate out the meats in their system so she can’t provide individual numbers.*

[b]domestic varieties of deer, bison, rabbit, quail

Food Standard & Delivery Preferences (All Protein Summary)

This section highlights the food standard and delivery preferences for all protein products sourced by food retailers.

Food standard preferences – Retailers ordered a variety of fresh (4 out of 4), frozen (3 out of 4), and smoked (1 out of 4 products) protein products. For many respondents, knowing that animals were raised in a grass fed and/or free-range environment was the most important food standard preference (3 out of 4), followed by high-quality cuts of meat (2 out of 4), and a food safety certification (2 out of 4).

Regarding the types of processed meat purchased by retailers, respondents indicated purchasing the following cuts of meat:

Packaged Meats	**Beef**	**Farmed Game**
Chicken	Whole animal	Rabbit (whole)
Pork	(various cuts)	
Sausage		
Bacon		

Delivery preferences – All four retailers said that they prefer their meat products to be delivered directly to the store, either by the producer/processor or a wholesaler with delivery frequencies ranging from 1-2 times a week (3 out of 4) to once a month (2 out of 4) depending on the time of year.

Eggs

Regarding the procurement of local eggs, whole chicken eggs were the primary egg product sourced with retailers reporting over 22,060 dozen eggs sourced annually – 9,642 dozen of which were sourced locally. This quantity was used across seven different retailers, all of whom said that they source eggs year-round. All the retailers indicated a preference to have the eggs delivered directly to the store and all but one said that they have their eggs delivered weekly; however the retailer who didn't get weekly deliveries still said that they wish they could have more regular deliveries, saying that the producer brings in eggs infrequently even though their customer base loves the local eggs, and said that they wish the producer could bring in eggs more regularly.

The types of eggs sourced by retailers varied across the board with respondents saying that they purchase small (1 out of 7), medium (2 out of 7), large (5 out of 7), and extra-large eggs (4 out of 7). Over half of the respondents said that they prefer brown eggs (4 out of 7) to white eggs (2 out of 7) with one saying that they had no preference. Nearly all the retailers said that they would be interested in sourcing more of their eggs from a local producer (6 out of 7) and four said that they would be willing to pay a premium price[31] for local eggs.

Other Products

Food service representatives were given the opportunity to discuss any 'other' products not yet discussed during the interview. Respondents identified maple syrup and honey as the two main 'other' products sourced (see table 27). Honey was the largest 'other' product mentioned by retailers at over 600 liters and 240 bottles of honey sourced annually – nearly all of which was sourced locally (see table 27). This quantity was split between three retailers who reported

[31] Up to 10% more (1 out of 7); up to 20% more (2 out of 7); and over 50% more (1 out of 7).

sourcing honey both seasonally and year-round. All retailers indicated a preference to have the honey delivered directly to their store from the producer with delivery frequencies ranging from every other week (1 out of 3) to once a month (2 out of 3) to a couple times a year (1 out of 3). All three retailers indicated an interest in sourcing more local honey under the right circumstances (i.e. demand and price dependent) with all saying that they'd be willing to pay a premium price (up to 30% more) for a local product.

Maple syrup was the second largest 'other' product sourced by retailers who reported purchasing 275 liters and 48 bottles of maple syrup annually (see table 27). This quantity was sourced year-round by two retailers, both of whom indicated a preference to have the maple syrup delivered directly by the retailer. Delivery frequencies ranged from once a month (1 out of 2) to a couple times a year (1 out of 2). When asked to comment on specific food standard preferences one retailer noted the importance of having the proper food safety certifications while the other simply said that the maple syrup undergoes the necessary inspections. When asked about sourcing more maple syrup locally both retailers indicated an interest – demand and cost dependent – and said that they'd be willing to pay up to 30% more for a local product.

Table 27: Amount of Other Products Sourced by Food Retailers (n=6)

Other Products	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Honey	617	557	60	Liters
Honey	240	240	-	Bottles
Maple syrup	275	172	103	Liters
Maple syrup	48	48	-	Bottles

3.3.3 Food Processing

A total of eight food processing representatives from Manitoulin participated in this study, identifying products that they are either currently sourcing locally or have the potential to be sourced locally. The top food categories identified were vegetables, fruits and berries, proteins, eggs, and grains. This section provides an overview of these food categories, focusing on food items sourced in the largest quantity, and providing high-level information on preferred process conditions, delivery, and price along with the respondent's interest in procuring these food items from a local source in the future.

Vegetables

Food processors identified kale, lettuce, cucumbers, and zucchini as primary vegetable items that they are able to source locally (see table 28). All of these produce items were grown on site by a single processor and as such was only sourced seasonally and didn't require delivery. High food standards were important to this processor who grew all produce outdoors and had all the necessary food safety requirements for processing. When asked about sourcing more produce locally this processor said that they are currently growing all that they need for their production.

Table 28: Amount of Vegetables Used by Food Processors (n=4)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Kale	454	454	-	Kg
Lettuce	227	227	-	Kg
Cucumbers	20	20	-	Kg
Zucchini	20	20	-	Kg

Fruits and Berries

Food processors identified apples as a primary fruit product that they are able to source locally – reporting a total of 218 kg apples – and 163 kg local apples – sourced annually (see table 29). This quantity was sourced by one processor who reported sourcing apples (fresh and unprocessed) seasonally. Regarding delivery preferences, this processor said that they prefer to visit the producer to pick up their order, with pick-ups taking place on an as needed basis. When asked about sourcing more apples the interviewee said that they would be interested in sourcing more local apples, and that they'd be willing to pay a premium price for a local product.

Table 29: Amount of Fruit Sourced by Food Processors (n=4)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Apple	218	163	54	Kg
Rhubarb[a]	7	2	5	Kg
Pears	3	1	3	Kg
Raspberries	2	0	2	Kg

[a] *Although technically a vegetable, rhubarb was classified here as a fruit/berry product for its use in jelly/jam/pie fillings along with other fruit/berry products*

Food Standard & Delivery Preferences (All Fruit Summary)

This section highlights the food standard and delivery preferences for all fruit/berry products sourced by food processors.

Food standard preferences – All processors said that they source fruit/berries that are fresh and unprocessed. Apart from that, none had any specific food standard requirements apart from checking to make sure that the product is fresh and unspoilt. One processor noted that since the fruits are going into baked goods that it doesn't matter what they look like (i.e. regular shaped or sized) because it doesn't affect the end product.

Delivery preferences – All of the processors interviewed reported sourcing fruit/berry products when they are in season, and that they prefer to visit their producers to pick up fruit/berry products. Deliveries typically take place on an as needed basis with one processor indicating that they purchase produce once or twice a year (3 out of 4 products).

Proteins

Food processors identified beef, chicken, lamb, and pork as primary protein items that they source throughout the year. Beef was the largest protein identified by processors at almost 3,000 kg local beef sourced annually (see table 30). This quantity was sourced across two processors who reported purchasing beef year-round. Both processors had their beef delivered directly to them by another processor with deliveries taking place every 1-2 weeks. Both processors ordered fresh beef cuts with one specifying that they purchase whole animals. When asked about sourcing more beef locally both respondents said 'yes' under the right circumstances. Additionally, both processors indicated that they'd be willing to pay a premium price (up to 10% more) for locally produced beef.

Table 30: Amount of Proteins Used by Food Processors (n=5)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Beef	2,993	2,993	-	Kg
Beef[a]	700	-	700	Individual
Chicken	720	-	720	Whole Animal
Lamb/mutton	40	30	10	Whole Animal
Pork	10	10	-	Whole Animal

[a]*Beef tenderloin - approx. 700 loins per year*

Food Standard & Delivery Preferences (All Protein Summary)

This section highlights the food standard and delivery preferences for all protein products sourced by food processors.

Food standard preferences – All processors reported sourcing fresh and unprocessed proteins with four out of the five purchasing whole animals (i.e. beef, chicken, lamb, and pork). Proper food safety certification was identified by all processors as an important food standard preference. One processor indicated high quality cuts of meat as a food standard preference and emphasized that animals need to be properly finished with respect to lean/fat content.

Regarding the types of processed meat purchased by processors, respondents indicated purchasing the following cuts of meat:

Beef	**Chicken**	**Lamb/Mutton**	**Pork**
Whole animals (dressed) Beef tenderloin	Whole bird	Whole lambs (dressed)	Whole animal (dressed)

Delivery preferences – All processors reported sourcing proteins year-round, with their products delivered directly to them from producers / other meat processors, 1-2 times a week (5 out of 5 products).

Eggs

Regarding the procurement of local eggs, processors identified whole chicken eggs as a main product sourced throughout the year. One processor spoke to their use of eggs, saying that they source 660 dozen eggs every year – all of which were sourced locally. This processor reported sourcing whole chicken eggs, seasonally, from a local producer. When asked about delivery preferences they indicated that they prefer to pick up their eggs directly from the producer once a week. This processor also indicated a preference for large eggs (without specifying a specific preference for either white or brown) and said that they order 2 ½ dozen at a time. When asked about price this processor said that they are willing to pay a premium price for local eggs, however they are not currently looking to source any more eggs as their producer is currently supplying all that they need.

Grains, Oilseeds and Pulse Crops

Regarding the procurement of grain products, processors identified barley, wheat, oats, rye flour, and hops as the main grain products sourced throughout the year. Barley was the largest product sourced with processors purchasing 15,000 kg annually – none of which was sourced locally (see table 31). When asked about their delivery preferences, this processor said that

they order barley packaged in 25-kilogram bags, once a month, from a wholesaler. Regarding specific food standard preferences, the interviewee simply said that the grain needs to be properly milled, no contaminants, with consistent quality. When asked about price this processor said that they would be willing to pay a premium price for local grains, however they are currently not interested in sourcing barley locally.

Table 31: Amount of Grains Sourced by Food Processors (n=6)

Grains	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Barley	15,000	-	15,000	Kg
Wheat	240	-	240	Kg
Oats	135	-	135	Kg
Rye Flour	120	-	120	Kg
Hops	110	-	110	Kg

Food Standard & Delivery Preferences (All Grain Summary)

This section highlights the food standard and delivery preferences for all grain products sourced by food processors.

Food standard preferences – Regarding their specific food standard preferences, half of the respondents identified proper food safety certification as an important food standard criterion (3 out of 6 products) while the other half simply stated that the grains have be properly milled with no contaminates (3 out of 6).

Delivery preferences – In regard to their delivery preferences, half of the respondents said that they source grains year-round (3 out of 6) while the other half source grains seasonally (3 out of 6). None of the processors specified whether or not they have their grain products delivered directly to them however one noted that they place monthly orders for barley and oats and order hops once a year.

3.3.4 Food Programs

A total of nine food program interviewees participated in this study by identifying products that are currently being sourced locally or that have the potential to be sourced locally. Food program representatives identified: vegetables, fruits and berries, proteins, dairy products, eggs, and grains as primary food categories. The following subsections provide an overview of these food items, focusing on items sourced in the largest quantity, while providing high-level information on preferred process conditions, delivery, and price along with the respondent's interest in procuring these food items from a local source in the future.

Vegetables

Food programs identified potatoes, squash, and tomatoes as vegetable products used in greatest quantities. Potatoes are the largest vegetable item soured at 3,000 kg sourced across 5 programs every year – over 900 kg of which came from a local source (see table 32). Of the nine food program representatives interviewed, five sourced potatoes. Potatoes were delivered, fresh and unprocessed, to three food programs 1-2 times a week, while the other two picked up the potatoes from the producer or grocery store. Food program representatives typically weren't picky about the quality of the potatoes as long as they were fresh and safe to eat. All the interviewees said that they would be interested in sourcing more local potatoes however none of

them were willing to pay extra for a local product, saying that the price would have to be comparable for them to consider switching producers.

Squash was the second largest vegetable item sourced by food programs at a reported 640 kg sourced annually – all of which came from a local source (see table 32). Neither program ordered the squash from a producer or retailer but rather one program receives squash regularly as a donation (every 1-2 weeks) while the other reported growing squash in their community garden (harvesting several times a week when ripe). As such, both respondents said that they squash they source is fresh and unprocessed. When asked if they would be interested in sourcing more local squash one respondent said that they would be interested in expanding their community gardens to grow more vegetables and the other said that they are always open to more donations. Neither respondent indicated that they would be willing to pay more (or purchase) more squash locally as purchasing vegetables wasn't a part of their program model.

Tomatoes was the third largest vegetable product sourced by food programs at 300 kg per year – over half of which was sourced locally (see table 32). Both interviewees who spoke to this product said that they source fresh and unprocessed tomatoes when they are in season with deliveries taking place once a week and once a month respectively. Deliveries varied by program with one program receiving direct deliveries from a local producer while the other program was donation based and received tomatoes via individual donations from home gardens. When asked about food standard preferences both interviewees said that they don't have any particular preference as long as the produce is fresh and safe to eat. Both interviewees said that they would be interested in sourcing more local tomatoes, however neither said that they would be willing to pay a premium price for a local product.

Table 32: Amount of Vegetables Used by Food Programs (n=16)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Potatoes	3,007	905	2,102	Kg
Squash	640	640	-	Kg
Tomatoes	300	156	144	Kg
Pumpkins	190	190	-	Kg
Beans	109	109	-	Kg
Corn	27	27	-	Kg
Garlic	23	23	-	Kg
Bell peppers	9	1	8	Kg
Onions	5	5	-	Kg

Food Standard & Delivery Preferences (All Vegetable Summary)

This section highlights the food standard and delivery preferences for all vegetable products sourced by food programs.

Food standard preferences – All food programs purchased produce that was fresh and unprocessed (16 out of 16 products). The food standard preference reported on the most often was produce that was grown in a greenhouse (6 out of 16) followed by certified organic produce (5 out f 16), and unblemished/regular shaped food (2 out of 16). Many of the interviewees however noted that they are not picky about the type of produce brought in as long as it's fresh and safe to eat (10 out of 16), with one respondent noting that, *"It's okay if it doesn't look perfect. It adds character. Some of their producers are recognized through a food safety*

program but they don't have to be. The food is just grown. The store-bought ones are [certified] but some of the local ones aren't."

Delivery preferences –Delivery preferences ranged from organizing drop-offs from the producer and/or grocery store (10 out of 16 products) to picking up deliveries from a local producer or wholesaler (3 out of 16) or receiving donations from individual/community gardens (7 out of 16). Delivery frequencies also ranged with some food programs receiving regular food orders/donations 1-2 times a week (10 out of 16) while others received food deliveries on a bi-monthly or monthly basis (6 out of 16). Some food banks noted that they are only open once a month and so they schedule their food orders a few days before the food bank is open while others received food donations from community gardens and so the food comes in throughout the summer/fall as produce ripens.

Proteins

Food programs identified beef, chicken, pork, fish, and wild game as primary protein products sourced annually. Beef was the largest product with food programs reporting sourcing 2,465 kg of local beef in the last year (see table 33). This quantity was sourced by three different food programs, all of which sourced beef products year-round, and purchased from a retail grocery store. Respondents typically sourced ground beef or hamburgers however sometimes other cuts of meat are purchased as well. Deliveries ranged from once a week (2 out of 3) to once every two months (1 out of 3). Respondents identified food safety certification (2 out of 3), grass-fed beef (1 out of 3), and grade A+ beef (1 out of 3) as primary food preferences. All three interviewees said that they would be interested in sourcing more local beef, however none of them were willing to pay a premium price for a local product, specifying that the beef would have to be price competitive.

Table 33: Amount of Proteins Used by Food Programs (n=11)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Beef	2,465	2,465	-	Kg
Beef[a]	360	-	360	Packages
Chicken	90	-	90	Packages
Chicken	10	10	-	Kg
Pork	90	-	90	Packages
Fish[b]	60	60	-	Whole Animal
Fish[b]	9	9	-	Kg
Wild Game[c]	8	8	-	Whole Animal

[a]*Hamburger Packages*
[b]*Wild and/or cage raised*
[c]*Moose & Deer*

Food Standard & Delivery Preferences (All Protein Summary)

This section highlights the food standard and delivery preferences for all protein products sourced by food programs.

Food standard preferences – Food programs sourced proteins in various processed conditions including fresh and unprocessed and/or whole animals, frozen packages, smoked, and cured meat. Regarding specific food standard preferences, interviewees most often cited a preference for wild and/or free ranged animals (7 out of 11 products) followed by high quality/graded meat (4 out of 11), and food safety certified (3 out of 11).

Regarding the types of processed meat purchased by food programs, respondents indicated purchasing the following types of meat:

Beef	Chicken	Pork	Fish	Wild Game
Quarter cow (various cuts)	Whole birds (live)	Pork chops	Whole fish (fresh/unprocessed)	Deer (whole animal)
Ground beef	Chicken breasts			Moose (whole animal)
Hamburgers	Chicken thighs			

Delivery preferences – Food programs reported a variety of different delivery methods that included: direct delivery from the grocery store (2 out of 11), direct delivery from a producer (2 out of 11), and pick-up from the producer (2 out of 11). A couple of food programs who received wild game discussed sending the deer/moose to a local butcher for processing and one program discussed hosting community events after a group fishing trip where they teach clients on how to properly clean the fish. Delivery frequencies also ranged from once a week to once a month for regular deliveries to 1-2 times a year for community hunting/fishing trips.

Dairy Products

Regarding the procurement of dairy products, food program representatives listed white milk as a main dairy product and reported purchasing 1,740 kgs of milk annually – none of which was locally sourced. This quantity was sourced between two food programs, both of which stated that they source milk year-round from a grocer/wholesaler and that they place orders 1-2 times a week. Each program purchased 3-liter bags of milk and both specified having the proper 'food safety certification' as a primary food standard concern. Although neither of them was sourcing their milk locally, one interviewee said that they would be interested in switching to a local source provided they can source the milk for the same price.

Eggs

Regarding the procurement of egg products, three food programs spoke to their use of whole chicken eggs, stating that they purchase a total of 1,748 dozen eggs per year – of which 543 dozen were sourced locally. All three food programs said that they source their eggs year-round from their local grocery store – with one program saying that they also have their own laying hens. Out of the three programs, two said that they source eggs weekly while the third sourced eggs on an 'as needed' basis. Regarding specific food standard preferences, two programs said they prefer brown eggs, one said they prefer white eggs, and one programs specified large eggs as a preference. In addition, two interviewees spoke to the importance of having proper grading and/or food safety certification. When asked if they would be interested in sourcing more eggs locally, two out of the three said 'yes' under the right circumstances (i.e. price and food safety). Only one out of the three interviewees said that they would be willing to pay a premium price (50% or more) for locally produced eggs.

Grains, Oilseeds and Pulse Crops

Regarding the procurement of grain products, one food program interviewee spoke to their use of wheat, saying that they purchase 1,650 loaves of bread annually. This respondent indicated that they source bread year-round from a wholesaler once a week. When asked about price and food standard preferences, this interviewee said that the price is the same when purchasing bread locally and that all of their products need to be certified through the appropriate food safety programs. Currently none of the bread purchased is being sourced locally and this respondent didn't speak to their interest in sourcing more local breads in the future.

3.4 What are the Challenges and Opportunities from the Producer Perspective?

Two food producer focus groups were conducted on Manitoulin Island where local producers and harvesters were brought together to discuss the challenges they face in selling / marketing their products to businesses and organizations as well as the opportunities and areas for potential growth. One focus group was conducted with producers in Providence Bay and the other focus group was conducted with Indigenous producers / harvesters and community members in Wiikwemkoong.

Findings from the Providence Bay *Session*

Attendees at the Providence Bay session identified a variety of challenges they face in selling / marketing their products to local businesses and organizations. The following list reflects the range of issues that were raised by producers during the discussion session (the issues are not necessarily presented in order of importance).

Pricing

- It's difficult to be competitive on pricing in comparison to major food distributors.
- Some businesses are not willing to pay a higher price for locally grown product.

Seasonality and product availability

- The growing season is short which results in limited availability of some food items through the year (e.g. fresh produce).

Difficulties with buyer practices / attitudes

- Some businesses are not interested in changing their menu or style of food to make greater use of locally grown foods.
- Producers questioned whether retailers have a genuine interest in procuring locally grown food. It was noted that local retailers and wholesalers are accustomed to the pricing offered through major food distributors (e.g. discount pricing on volumes) and that these establishments offer a level of convenience that local businesses don't want to have to sacrifice (e.g. one stop ordering and delivery vs. coordinating purchases and deliveries through 10 different local producers).
- Businesses don't see the value of incorporating locally grown foods in their operation.

Logistics of delivery

- It's challenging to make money on small orders that need to be delivered a long distance (i.e. cost of personal time and transportation make it unprofitable).
- Major markets are too far away to justify the effort to expand production.

Regulations / product specifications

- It's challenging for small producers to shoulder the costs of the food labelling regulations (e.g. nutrient labelling, UPC codes, etc.) for retailing purposes.

Manitoulin based producers also discussed some of the factors that are limiting their ability to expand their operations. Several producers noted that the returns from farming are not sufficient and/or secure enough to risk expansion. Producers observed that there is greater security in having a spouse/partner working in a non-farm job than having everyone committed to just the farm enterprise.

Several producers also commented that they face ongoing issues with finding reliable labour. It was noted that it's challenging to find youth who want to work on a farm and the youth that are hired typically do not have a good work ethic and do not last long. Producers commented that it takes the 'right personality and attitude' to work on a farm as the work can be physically challenging, the hours can be long, and season short. It was further noted that youth have expectations of what they should be earning which can be above what the farmer is prepared to pay (e.g. $20 per hour). Several producers have found that hiring recent retirees is a good strategy as these individuals are looking for something to do and are dependable.

It was suggested that the existing meat processing capacity on the Island is inadequate in terms of meeting the needs of all the producers. It appears that smaller producers in particular have experienced issues with reliability and the pricing and quality of processing being offered. Although there are meat processing options available in other communities off the Island (e.g. Massey) there are additional transportation costs and time commitments required to reach these facilities. With respect to fresh produce processing, at least two producers noted that they don't have access to the certified processing / packing / storage facilities that grocery stores now require before they'll accept your produce.

It was emphasized that soil and climate conditions vary considerably across the Island and this represents both a challenge and opportunity for producers. There are opportunities to produce a diversity of products on the Island but producers need to be aware/informed about the different areas of the Island that are best suited for particular farm practices in order to maximize the production potential. It was suggested that government bodies / institutions are not providing enough relevant information on the local growing / climate conditions to assist / guide producers. One producer provided the example of taking the initiative on his own to explore and seek out guidance from other geographic regions with similar conditions (e.g. Newfoundland).

There is a general view that there have been more extreme weather events over the last five years (e.g. hot and dry, cold and wet) and this has negatively impacted some crops (e.g. loss of perennial crops such as berries).

Wildlife are problematic (e.g. deer consume/destroy crops such as strawberries, carrots; racoons and bears damage maple syrup pipelines). It was also noted that some producers encounter issues with off-islanders who trespass and steal products off the farm.

Producers noted that as an agri-region, Manitoulin Island is not well serviced / supplied by farm support businesses (e.g. farm supplies, farm equipment, vet services) and that it can be difficult to get services and supplies on short notice. It was further noted that the cost of some services (e.g. vet services for large animals) has increased substantially to the point where it can be unviable to use the service in many cases.

It was noted that land speculation in the area has raised property taxes – resulting in additional expenses that local producers have to account for.

Manitoulin based producers were asked to comment on the key opportunities / areas for action that they see in marketing locally grown / harvested foods to local businesses and organizations. The following list reflects the range of opportunities that were raised during the discussion session with local producers (they are not necessarily presented in order of importance).

- It was generally recognized that more needs to be done to encourage / facilitate discussions between local producers and retailers. One producer observed that a speed

dating approach has been used in other places and this might be an activity that could be coordinated for producers and retailers on the Island.

- Many of the producers emphasized the importance of marketing the Manitoulin story and several producers suggested that the 'Made on Manitoulin' branding campaign needed to be revitalized.
- It was suggested that consumers are attracted to the story behind the product (e.g. how and where the product was grown/raised, how processed food items were prepared, etc.) and this needs to be built into local food branding / marketing strategies.
- It was further suggested that attractive and eye-catching displays in grocery stores needed to be used to promote locally grown foods from the Island and that fresh produce displays in particular need to be routinely refreshed / restocked to maximize the attractiveness of the display.
- It was noted that more could be done to try and capture more tourism dollars by ensuring that Manitoulin foods are intensely profiled / showcased (highlighting the quality and uniqueness of locally grown products, ensuring that locally grown products are well advertised / marketed at major entry points onto the Island, ensuring that locally grown products are promoted and easy to access in retail stores, gift stores and other outlets).
- Farmers' markets were identified as an important marketing strategy for local producers. Several producers noted that a key benefit of selling through the farmers' market is that producers can retain more revenue through direct sales to consumers vs. selling their product to a retailer. Producers emphasized the importance of having a variety of products available at the farmers' market (e.g. fresh vegetables, fruit/berries, honey, eggs, baked goods, etc.) as this serves to pull more consumers into the market. One challenge associated with the farmer's market is that the tourism traffic drops off in the fall just as the busiest period of harvesting occurs.

During the focus group discussion, the facilitators dedicated a portion of time to present results from the key informant interviews that were conducted with the Manitoulin based businesses / organizations from the four areas of food demand. The facilitators shared summary findings in relation to the following questions:

- What is the region of reference that businesses / organizations use in defining 'locally grown'?
- What are the key motivations that drive businesses / organizations to procure locally grown food?
- What are the key concerns / challenges that businesses / organizations face in procuring locally grown foods?

Producers were invited to share their observations on the findings and the extent to which the findings were consistent / inconsistent with their personal views / experience.

In general, the producers associate the term 'locally grown' with food items that are grown / harvested on the Island and with food items that are grown / harvested within northern Ontario. About 60% of the businesses / organizations interviewed shared a similar definition as the producers while about 40% held a broader definition that identified all of Ontario and/or Canada as locally grown. The interview results appeared to align with what many of the producers expected.

Producers anticipated that the high quality of local Manitoulin food items and the value of using 'Manitoulin grown' as a selling feature would be among the key motivators driving businesses / organizations to procure from local producers. In actuality, the interview results revealed that the

most common factor motivating businesses / organizations to procure locally grown food was to support the local economy (65%) with the high quality of locally grown foods ranking as the second most common factor (51%).

With respect to key concerns, producers were not surprised to see that the most common concern raised by businesses / organizations was the perceived high cost of locally grown foods (45%). Producers also recognized the other key concerns brought forward by businesses / organizations including the insufficient volume of production (24%) as well as issues related to seasonality / inconsistent availability (26%).

It is worth noting that the producers were generally receptive to sharing their thoughts and observations and engaging in the conversation during the two-hour plus discussion. However, some producers also have doubts about how the information from this study will actually translate into meaningful change.

Findings from the *Wiikwemkoong Session*

Many of the attendees at the Wiikwemkoong session have direct ongoing experience with growing / harvesting local foods and/or they had a historical attachment to these activities (i.e. their parents and grandparents were involved in these types of activities).

One of the producers/harvesters shared the story of his harvesting practices and activities (e.g. hunting/trapping wild game, fishing, harvesting wild rice and cranberries) and his enthusiasm for reintroducing people, especially youth, to these traditions. He also emphasized the importance of teaching youth how to prepare meals from scratch (e.g. techniques for preparing and cooking meat) and utilizing different ingredients in the meal preparation – again, based on traditional methods. He feels that there is growing interest in reacquiring these skills.

Another harvester described harvesting and foraging as a form of social activism to raise awareness about the variety of food and medicinal ingredients that can be gleaned from the natural environment.

One attendee described her active involvement in advocating for and supporting agriculture in the community through community-based initiatives including community gardening, community bees, apple tree plots, and seed saving workshops.

Attendees at the Wiikwemkoong session identified a variety of challenges they face in selling / marketing their products to local businesses and organizations. The following list reflects the range of issues that were raised by producers during the discussion session (the issues are not necessarily presented in order of importance).

- Producers / harvesters have limited capacity/time to transport products to markets… a practical and affordable food delivery structure is needed that responds to the needs of small scale producers / harvesters.
- Food retailers require producers to meet health and safety certifications in relation to food handling, processing and delivery activities and individual producers and harvesters typically do not have access to the necessary equipment/facilities.
- There are no local food processing / distribution facilities to support value added activities (e.g. produce washing/drying, cutting/trimming, sorting/packaging, pickling, cold storage/freezing, etc.) which could also potentially hold the necessary food health and safety certifications required by retailers. It was further suggested that small producers need access to test kitchens and support with labelling / identifying nutrient content /

UPC codes and a processing / distribution facility could potentially include these activities.
- Producers / harvesters are not well connected to each other and activities are not well coordinated. Production / harvesting activities are inconsistent.
- The unique products produced in the region (e.g. hand-picked blueberries) are not properly marketed when they reach urban centres and consumers are missing out on the connection that the product has to the land where it was grown / harvested.
- Retailers are resistant to stock locally grown / harvested foods because they want to provide their customers with a consistent supply of products and local producers / harvesters are unable to provide the volumes they need in a consistent manner.

Attendees at the Wiikwemkoong session also discussed some of the factors that are limiting the ability of producers / harvesters to expand their activities. It was suggested that a coordinating body is needed to support producers / harvesters in networking and developing strategies to promote the expansion of production / harvesting activities and identifying community priorities (e.g. establishing a local food processing / distribution centre). It was suggested that funding could be secured (e.g. self-employment funding) to support a coordinator but securing infrastructure funding is more problematic in terms of having seed funding for securing loans. Several attendees emphasized the importance of exploring opportunities for establishing a local food processing / distribution facility which could also provide the food safety certifications that retailers demand. It was suggested that this could be an existing building that is repurposed.

A further concern raised by the attendees is that the objectives / criteria associated with some funding programs are not well aligned with what the community actually wants/needs. It was suggested that funders need to be more receptive to and supportive of projects that are representative of the community needs even if some elements of the project do not entirely align with the formal funding criteria. It was emphasized that the development and strengthening of local food systems is not a ‘one size fits all’ initiative.

Attendees at the Wiikwemkoong session Attendees at the Wiikwemkoong session were asked to comment on the key opportunities / areas for action that they see in marketing locally grown / harvested foods to local businesses and organizations. The following list reflects the range of opportunities that were raised during the discussion session with local producers (they are not necessarily presented in order of importance).

- It was noted that a roadside farmers’ market was recently established in the community when a local Mennonite farmer asked for and received permission from the Chief to set up a roadside stand. Other members of the community have since joined the location to sell their baked goods. It was suggested that an expanded weekly farmers’ market might work in the community as there is demand (i.e. people are buying / trading each other’s goods).
- Nursing home / institutional regulations make it difficult to procure locally grown / harvested foods (e.g. deer meat, locally harvested/foraged foods). However, it appears that some health centres have made progress in this area (Sioux Lookout MenoYaWin Health Centre and Shkagamik-Kwe Health Centre – Sudbury, were cited as examples) and these opportunities need to be explored further.
- Ensure that an education component is included in the marketing of locally grown / harvested foods in urban centres (e.g. the marketing should include a narrative on where the product specifically came from and how it was grown and/or selected).

- More focus is needed in educating consumers about the nature of local production / harvesting practices and fostering more realistic consumer expectations in relation to the availability / seasonality of local foods.
- Hunting, harvesting and farming are not being promoted as viable career opportunities and more needs to be done to raise awareness about these activities and additional resources are needed to support youth training and skills development in traditional hunting, harvesting and farming techniques.
- Coordinate and promote opportunities for combining production / harvesting / trapping activities with cooking demonstrations / workshops.
- Several attendees suggested that interest is growing among youth to work more closely to the land. This includes interest in hunting and trapping as well as interest in gardening and greenhouse production activities.
- It was noted that a greenhouse has been established at the local high school where youth can gain an introduction to production practices/techniques and have an opportunity to learn and practice their skills (Wiikwemkoong Greenhouse for Change). The high school worked with Focus Forward for Indigenous Youth and secured a $50,000 award from the AVIVA Community Fund to proceed with the initiative. The high school project works in partnership with the Wii-ni n'guch-tood Labour Market Service (WLMS)/Wikwemikong Development Commission. During the building phase of the greenhouse, students through the coop program assisted with construction and received credits while being paid for their work. The greenhouse is a modern facility that is solar powered and uses a biomass heating system. The greenhouse is large enough to house 25 students as a classroom. Production activities include tomatoes, cucumbers, and hydroponics. Funding was also secured from Trees Canada and 80 fruit trees have been planted to start an orchard. The group is also planning to build an outdoor kitchen.
- Attendees suggested that further investigation is needed to determine if / how funding could be secured through the Indian Agricultural Program of Ontario (IAPO) to support additional projects and initiatives in the region.

Several of attendees spoke about the traditional importance of trading / bartering as a way of exchanging goods and services and some community members continue to use these practices. It was further observed that some people are using Facebook for trading and selling surplus garden produce, maple syrup, baked goods, sauces, jams and meat/fish. One attendee suggested that the practice of trading / bartering is gaining renewed interest in the community and he has promoted the approach with the youth he's teaching to hunt/trap. Another attendee commented that trading and bartering reinforces community bonds and trust as there is a deeper meaning attached to the exchange when two people negotiate and come to an agreement on what is fair while acknowledging the hard work put into producing the product or providing the service.

During the focus group discussion, the facilitators dedicated a portion of time to present preliminary results from the key informant interviews that were conducted with the Manitoulin based businesses / organizations from the four areas of food demand. The focus group attendees were invited to share their observations on the findings and the extent to which the findings were consistent / inconsistent with their personal views / experience.

In general, the focus group attendees were not surprised to see that 40% of the businesses / organizations interviewed held a broad definition where they identified all of Ontario and/or Canada as locally grown (vs. 60% of the businesses / organizations that identified locally grown as food produced / harvested on the Island and/or within northern Ontario).

Similarly, the focus group attendees were not surprised to see that a majority of the businesses / organizations (65%) are motivated to procure locally grown / harvested foods for the benefits this provides to the local economy. Given that almost 22% of the businesses / organizations suggested that their customers demand locally grown options, the attendees expected to see a similar proportion of businesses / organizations using ‘locally grown’ as part of their marketing campaign but only about 12% are.

The focus group attendees were not surprised to see that a key concern that businesses / organizations have in relation to locally grown / harvested foods is the observation/feeling that they are higher costing than non-local options. The attendees also recognized the other key concerns brought forward by businesses / organizations including the insufficient volume of production (24%) as well as issues related to seasonality / inconsistent availability (26%).

4.0 Conclusions & Recommendations

Conclusions

Agricultural production in Manitoulin District is substantial and diverse. Despite the absence of Class 1 soils which have the greatest potential for agricultural production, there is considerable land acreage in the region with Class 2 to 4 soils which support a range of food production activities.

These activities include field crop production (e.g. grains, oilseeds, potatoes, vegetables), fruits and berries (e.g. apples, strawberries, raspberries) and greenhouse production as well as mushrooms and maple syrup production. The region also supports a diversity of livestock production (e.g. beef, dairy, hog, sheep, goats) as well as poultry and egg production, and beekeeping. Beyond the cultivated lands, the natural environment supports wild game hunting and fishing activities as well as local harvesting activities (e.g. wild plants, mushrooms, berries, etc.) that contribute to the local food system. Manitoulin also features a substantial aquaculture sector.

The flow (i.e. marketing) of locally grown food through local businesses and organizations in Manitoulin District is not well understood. A key objective of this study was to engage with four areas of food demand in the region to expand our knowledge and awareness of how much interest businesses and organizations have in locally grown food, how they define 'locally grown' food, and the key factors that influence their decisions to source locally grown / harvested foods. Specifically, the four areas of food demand consist of:

1. local food processors (e.g. meat, fish, dairy, egg, grains, fruit/vegetables, other processing including breweries)
2. local food retailers (e.g. grocers, convenience stores, food wholesalers / distributors)
3. local food services (e.g. restaurants, hotel and accommodation establishments, caterers and banquet halls, institutions, day care centres, hospitals, assisted living facilities, etc.)
4. local food programs (e.g. food banks, good food box programs, student nutrition programs, meal delivery service programs, community kitchens, etc.)

It is important to note that the study results are from a relatively small sample of businesses / organizations (72 in Algoma District, 51 in Manitoulin / LaCoche, 61 in Greater Sudbury / Sudbury District / West Nipissing) and as such the findings cannot be generalized across the broader population of businesses / organizations in the region. However, the findings provide valuable insights on the food procurement activities/decisions of local businesses and organizations and represent important input to the planning and decision-making process for various local stakeholders that are looking to support/expand the local agri-food economy (e.g. farmers, food processors, food retailers, food services, food programs, lending institutions, economic development officials and policy makers, Indigenous communities and organizations, etc.).

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed. The majority of the businesses / organizations in Algoma District (almost 60%) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group more than half feel that 'locally grown' refers to food produced specifically in Manitoulin District. It's worth noting that almost 40% of the businesses / organizations hold an expanded definition of local food that encompasses areas of southern Ontario and/or other areas of Canada and this proportion is higher among businesses located in large urban centres (i.e. Sault Ste. Marie / Greater Sudbury).

The study revealed that most businesses / organizations have a high level of interest in sourcing locally grown foods (i.e. from the Algoma / Manitoulin / Sudbury region) but their level of awareness of local food options/availability is generally not as strong (i.e. some businesses / organizations acknowledge that they have limited knowledge of what's being produced locally).

Businesses and organizations were asked to identify the ways in which they typically stay informed about local food availability and options. The most common means by which businesses and organizations stay informed about local food options is through direct communication with growers and harvesters. Approximately half of all the representatives interviewed in each of the three districts identified direct communication as a key approach for staying informed about local food options.

Manitoulin based businesses / organizations use a variety of ways to stay informed about local food availability and options. Direct communication with producers is by far the most common and most preferred approach used and this finding is consistent across all four areas of food demand. Other common methods used for staying informed about local food options include communicating with food distributors, attending farmers' markets, and subscribing to relevant newsletters / social media.

The majority of Manitoulin based businesses / organizations (70%+) are currently sourcing some amount of locally grown foods from the Algoma / Manitoulin / Sudbury area and many of the businesses / organizations that are not sourcing local at this time are interested in doing so in the future. There was particularly strong interest from food processors and food service businesses / organizations and food programs in sourcing locally grown foods at a future date.

With respect to the key factors that motivate Manitoulin based businesses / organizations to source locally grown foods, one value stood out well above all the others and that's the recognition that buying local supports the local economy. This finding is consistent across all four areas of food demand. The next highest-ranking value is that locally grown food is higher quality and this attribute is especially valued by businesses / organizations in the food retail and food service sectors. Another key importance that businesses / organizations associate with locally grown food is that it's something their customers increasingly want / demand and they are using 'locally grown food' in their promotions to appeal to customers and distinguish their business.

With respect to the key factors that discourage Manitoulin based businesses / organizations from sourcing locally grown foods, one concern stood out well above all the others and that's the view that locally grown foods are more expensive than non-local options. This finding is particularly relevant to businesses / organizations in the food processing, food retail and food service sectors. Given that most food programs typically rely on food donations or discounted foods, cost wasn't so much a concern as was storage space (i.e. food programs have limited capacity to handle large volume donations – especially for food requiring refrigeration or freezing). Another high-ranking concern that businesses / organizations in the food processing, food retail and food service sectors have is that local producers are unable to provide the volumes they require which is closely related to other concerns including seasonality issues and general concerns about reliability (e.g. producers are unable to consistently deliver on the required volume).

A key interest of the NFAMS study was to examine the amount of locally grown / harvested food products being purchased by businesses and organizations and to identify areas for potential growth (i.e. the amount of foods being sourced from outside the Algoma / Manitoulin / Sudbury

region). The tabulated findings for the Manitoulin based businesses / organizations show that there are a number of food commodities where there are significant local food deficits that could potentially be addressed by local producers / processors. The following table provides an overview of some of the larger local food deficits that were identified through the study.[32]

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Potatoes	over 190,000 kgs
Carrots	over 3,900 kgs
Cucumbers	over 2,800 kgs
Sweet corn	over 2,600 cobs
Onions	over 2,000 kgs
Lettuce	over 2,000 kgs
Cauliflower	over 1,100 kgs
Tomatoes	over 1,000 kgs
Mixed greens	over 400 kgs
Apples	over 500 kgs
Strawberries	over 300 kgs
Raspberries	over 200 kgs
Blueberries	over 150 kgs
Malt barley	over 15,000 kgs

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Beef – various cuts	over 700 kgs
Beef – hamburger	over 1,600 kgs
Pork – various cuts	over 600 kgs
Pork – ground/sausage	over 1,000 kgs
Chicken – breast	over 300 kgs
Chicken – whole bird	over 700 birds
Eggs, whole shell	over 15,000 dozen
Eggs, hard boiled	over 500 dozen
Eggs, liquid	over 700 kgs
Milk, fluid	over 5,000 litres
Cheese	over 1,800 kgs
Ice cream	over 31,000 kgs

* Based on figures provided by the participating businesses/organizations.

With respect to pricing, food standards and food delivery preferences it is difficult to make generalizations about 'typical' interests / preferences / requirements. Some businesses / organizations are willing to make special allowances (e.g. blemished fruit can be used in baking) while others have much more rigid conditions that need to be met.

Although some businesses / organizations indicated that they would be willing to pay a premium price for a locally produced food item (e.g. 10-20%), it appears that most have a strong preference for the local food option to be competitively priced with non-local food options.

Many of the businesses / organizations also expect / want producers to have accredited food safety certifications in place and most expect / want producers to provide delivery of the product (or at least make the arrangements for the product to be delivered). These details along with specific quantities and other preferences/requirements (e.g. packaging units, types of meat cuts, etc.) are expanded on in the electronic data base that accompanies this report. Interested stakeholders are encouraged to review the business / organization profiles in the data base to gain a detailed understanding of the food preferences and needs at the level of the individual business / organization.

When we examine the challenges that local producers face in marketing their products, we find that many of the issues they face tie into the factors that discourage local businesses / organizations from buying their products. For example, producers feel that the pricing expectations that local businesses have are not very realistic when measured against the deep discounts that large volume food wholesalers/distributors can offer. Producers also noted that

[32] It is important to note that the figures presented in the table are derived from a small sample of businesses / organizations across the local food chain. As such, these figures represent only a partial picture of the total volume/weight of food items sourced from outside the Algoma / Manitoulin / Sudbury region.

land speculation in the area has driven up property taxes and these costs need to be carried forward in pricing their products.

Producers acknowledge that the short growing season in the region results in limited availability for some products (e.g. fresh produce) and that smaller scale farm operations in the region cannot satisfy the entire food volume demands of major food retail and food service businesses / organizations. However, producers feel that if there was a greater willingness on the part of businesses / organizations to adjust their procurement practices for certain periods of the year, then local producers could supplement a portion of their food needs with locally grown products. Another problematic feature of the local growing season is that the peak food harvest period on the Island occurs after the peak tourism period.

Producers also acknowledge that they face challenges in meeting the delivery needs of buyers. Some producers noted that they have limited time and/or lack the appropriate transportation to provide delivery. It was also emphasized that filling small volume orders for distant/isolated locations is not cost effective.

Soil and climate conditions vary across the Island and producers emphasized that it's important to understand what crops are best suited to the local conditions to maximize the production potential. Producers also noted that wildlife in the area can be damaging to production activities (e.g. deer grazing on crops, racoons and bears damaging maple syrup equipment).

With respect to meat processing, it was suggested that the options on the Island are very limited and the current facility does not meet the needs of every producer (e.g. accessibility, pricing, butchering specifications).

Another notable challenge identified by producers is the need for localized infrastructure capacity that will enable producers to meet the food handling/safety certification and processing needs of some businesses / organizations – especially food retail and food services. Producers suggested that a potential key action item going forward is to explore and support the development of a local Good Agricultural Practices (GAP) certified facility for handling / processing / labeling fresh produce products.

Other opportunities that producers feel need to be explored include:

- Encourage / facilitate discussions between local producers and retailers.
- Ensure that attractive, eye-catching wording and displays are used when showcasing locally grown products (e.g. in restaurant menus, in grocery stores, in gift stores).
- Revitalise the 'Made on Manitoulin' food branding campaign.
- Use strategic marketing at key entry points to the Island to inform tourists about the uniqueness of locally grown foods and where it can be accessed on the Island.
- Support the promotion and ongoing development of farmers' markets in the area. Ensure that the operating days/hours of the market are convenient and that a variety of food commodities are represented at the market to broaden the appeal of the market.

Additional opportunities that are more specific to Indigenous communities include:

- Explore the potential for introducing locally grown/harvested foods (e.g. deer meat, locally harvested/foraged foods) in local institutions (i.e. nursing home, schools etc.).
- Promote, hunting, trapping, harvesting, and farming activities as viable career opportunities and support and deliver training and skills development in these areas.

- Coordinate and promote opportunities for combining production / harvesting / trapping activities with community cooking demonstrations / workshops.
- Explore if/how program funding through IAPO can be better tailored to support new Indigenous farmers and if/how program funding can support more local/regional projects and initiatives.

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of Manitoulin based businesses / organizations across the four areas of food demand. The results section of the report and the accompanying electronic data base is intended to be used as a resource that interested stakeholders can access to search for additional details and to learn about the specific food needs / interests of individual businesses / organizations.

The results provide important cues for informing the role that local economic development officials and other interested stakeholders can take in facilitating, guiding and supporting actions to increase regional food production, processing and purchasing.

The following recommendations are informed by the survey and focus group results and they reflect the key themes that emerged from the study.

Communication

- Facilitate annual networking sessions between local producers and representatives from across the four areas of food demand to discuss their needs and share information. These sessions should be scheduled before the start of the peak tourism months (e.g. consider running the sessions in March/April).

- Provide communication tools and training / skills development initiatives to support producers in reaching buyers (e.g. using social media in promotions, preparing and deploying electronic newsletters).

- Explore, guide and support the development and/or application of a communication platform directed at businesses / organizations (food buyers) where producers can post / publicize their food production activities and the products they have to offer.[33]
    - The need for improved communication was emphasized by food retail and food service businesses / organizations. Information of particular interest includes production plans for the coming season/year, updates on what's currently available, delivery / pick-up options, and price list. Local businesses / organizations need to be regularly informed about the communication platform and guided on how it can be accessed and used.

[33] OntarioFresh.ca is an example of an existing Internet based information / communication platform where food producers, sellers, buyers and processors can post information about their operation and what they produce and/or procure as well as any services that they provide. However, at this time it appears that relatively few Algoma / Manitoulin / Sudbury based businesses are participating on the platform. Some business profiles are more complete than others. For example, it appears that most producers provide a list of the types of food items they produce and in many cases this information is supplemented with additional details (e.g. purchasing/payment methods, delivery options, liability insurance, food safety and traceability standards, organic certification, etc.). Some business profiles include a weblink to their pricing information and offer online purchasing. The website includes a search engine but there are limitations when searching by broad geographic regions. For example, a search for producers located in "Manitoulin" can result in an incomplete list -- specific communities in the region need to be searched to extract a more complete list from the directory.

- The communication platform could potentially be integrated with a product ordering and delivery service (see recommendation on logistics below).

Logistics

- Explore and support the development and implementation of systems and mechanisms to coordinate / manage the ordering, handling and delivery of locally produced foods between producers and buyers.
  - The need for improved delivery mechanisms was emphasized by food retail and food service businesses / organizations. Features of particular interest include single point ordering, regular scheduling of deliveries, allowances for low volume purchases, and delivery options for remote areas.

Certification Standards

- Provide guidance and supports to producers to facilitate the adoption and maintenance of food safety certification standards (e.g. facilitate introductions / orientation to relevant industry organizations, coordinate information/training workshops in conjunction with industry organizations).[34]
  - Food processors, food retailers, and food service businesses / organizations expressed a strong interest/need for local food producers to follow government recognized food safety standards (i.e. handling, processing, packaging, transportation) through an accredited certification body.

- Explore and support the development of a local Good Agricultural Practices (GAP) certified facility that is accessible to producers in the region.
  - A food ordering and delivery system could potentially be integrated with the GAP certified facility.
  - This facility could potentially offer a variety of services (e.g. warehouse storage area including industrial size cooler/freezer rooms, designated delivery and shipping areas, vegetable/fruit processing area, commercial test kitchen for product development, public meeting rooms for hosting information and demonstration events).[35]

[34] The Food Safety Recognition Program (FSRP) is led by the Canadian Food Inspection Agency (CFIA) with the participation of the provincial and territorial governments. Recognition acknowledges that a food safety program has been developed in line with a systematic and preventive approach to food safety based on international accepted standards (Hazard Analysis Critical Control Points – HACCP – principles); that the program conforms to federal, provincial and territorial legislation, policy and protocols; and that a food safety management system has been implemented in an effective and consistent manner. A number of different industry organizations are currently involved in FSRP including CanadaGAP Food Safety Program for Fruits and Vegetables, Canada Grains Council, Canadian Cattlemen's Association: Verified Beef Production, Canadian Pork Council: Canadian Quality Assurance Program, Canadian National Goat Federation: On-Farm Food Safety Program, Canadian Sheep Federation: Canadian Verified Sheep, Dairy Farmers of Canada: Canadian Quality Milk, Egg Farmers of Canada: Start Clean – Stay Clean, Canadian Honey Council. More information is available at: http://www.inspection.gc.ca/food/archived-food-guidance/safe-food-production-systems/food-safety-enhancement-program/recognition-program/eng/1299860970026/1299861042890

[35] The term 'food hub' is sometimes used to describe these types of facilities and the scope of services offered can vary depending on local interests/needs. Examples of food hub feasibility studies:

- Winnipeg, Manitoba
  - http://www.foodmattersmanitoba.ca/wp-content/uploads/2014/06/WFH-Feasibility-Final-Report-mar-2014-photos.pdf
- Township of Langley, BC
  - https://www.tol.ca/your-township/plans-reports-and-strategies/food-hub-feasibility-study/

Manitoulin Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for Manitoulin to utilize in food marketing campaigns (e.g. revitalise the 'Made on Manitoulin' food branding campaign).
  - Emphasize the key values that local businesses / organizations associate with locally grown food in marketing campaigns (e.g. buying locally produced food contributes to the local economy / supports local businesses and families, locally produced food offers the highest quality for customers).
  - Use strategic marketing at key entry points to the Island to inform tourists about the uniqueness of locally grown food and where it can be accessed on the Island.

Additional Opportunities for Indigenous Communities

- Support the development and coordination of knowledge transfer activities and events directed at youth and the broader community.
  - Host and encourage participation in demonstration and skills development activities to promote hunting, trapping, harvesting and farming activities as viable career opportunities.
  - Host and encourage participation in demonstration and skills development activities related to traditional food preparation / cooking / preserving.

- Explore if/how program funding through IAPO can be better tailored to support new Indigenous farmers and if/how program funding can support more local/regional projects and initiatives.

Appendices

Appendix A: Key Informant Interview Guide

About the Business / Organization

As a starting point can you provide a few background details about your business / organization…

1. What is the main activity of the business / organization as it relates to food?

□ Food service □ Food retail □ Food processing □ Food program

Additional details: _____

What year was your business / organization established? _____

Approximately how many people does your business / organization employ? _____

2. What District is the business / organization located in?

□ Algoma □ Manitoulin □ Sudbury □ Other, specify: _____

3. What community is the business / organization located in? _____

Do you have other outlets / operations in the Algoma / Manitoulin / Sudbury region and/or elsewhere?

□ Yes □ No

I. If yes, how many other outlets? _____

Local Food Awareness and Interest

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed.

4. In your opinion, what does 'local food' mean in terms of the geographic area and/or distance where locally produced or harvested food is sourced?

Interviewer note… use prompts as needed and check all that apply as identified by the respondent.

Region	Distance
□ Algoma District	□ Within a 25 km radius of less
□ Manitoulin District	□ Within a 26 to 50 km radius
□ Sudbury District	□ Within a 51 to 75 km radius
□ Nipissing District	□ Within a 76 to 100 km radius
□ Northern Ontario	□ Within a 101 to 200 km radius
□ Ontario	□ Within a 201 to 300 km radius
□ Canada	□ Within a 301 to 400 km radius
□ I'm not totally sure what local food means	□ More than 400 km radius
□ Other, specify: _____	

For the next few questions we'd like you to use the combined area of Algoma, Manitoulin and Sudbury districts as the reference area when thinking about locally grown and harvested foods.

5. On a scale of 1 to 10 where 1 is 'not at all interested' and 10 is 'very interested', how interested are you in sourcing and using locally grown and harvested foods?

1	2	3	4	5	6	7	8	9	10
Not at all interested									Very interested

6. On a scale of 1 to 10 where 1 is 'not at all aware' and 10 is 'very aware', how would you rate your personal awareness of local food availability and options?

1	2	3	4	5	6	7	8	9	10
Not at all aware									Very aware

7. How do you typically stay informed about local food availability and options?
Interviewer note… use prompts as needed and check all that apply as identified by the respondent.
□ Direct communication with growers and harvesters
□ Membership in local producer networks / associations
□ Subscribe to relevant newsletters / social media
□ Review producer websites
□ Food distributors / wholesalers provide information
□ Food retailers provide information
□ Attending farmers' markets
□ Other, specify: _____
□ Not applicable, currently not taking any action to stay informed

8. What is the best way/means for local growers and harvesters to provide you with information about their products?
□ Direct communication with growers and harvesters
□ Through local producer networks / associations
□ Through producer newsletters / emails / social media
□ Through producer websites
□ Through food distributors / wholesalers providing information
□ Through food retailers providing information
□ Other, specify: _____

Local Food Procurement Activity
I'd now like to focus our discussion on your local food procurement activity and practices.
9. Does your business buy any food grown or harvested within the Algoma, Manitoulin and Sudbury area - or buy any food products made with ingredients grown within this area?
□ Yes (go to 9.I and 9.III and 9.IV)
□ No, not at this time (go to 9.II and 9.III and 9.IV)
□ No, not at all (go to 9.II and 9.III and 9.IV)

I. What motivates you to purchase these foods?
Interviewer note: check off any of the following that apply:
□ higher quality
□ contributes to the local economy
□ animal welfare
□ environmental health
□ marketing tool
□ distinguishes the business
□ customers demand local food
□ getting to know farmers
□ other, specify _____

II. Even though you're not purchasing local at this time, do you see any potential advantages in sourcing locally grown / harvested foods?
If so, what are some of the positive features that you associate with local foods?
Interviewer note: check off any of the following that apply:
□ higher quality
□ contributes to the local economy
□ animal welfare
□ environmental health
□ marketing tool
□ distinguishes the business
□ customers demand local food
□ getting to know farmers
□ other, specify _____

III. What are some of the reasons that dissuade or prevent you from purchasing locally produced / harvested food?
Interviewer note: check off any of the following that apply:
□ not enough overall volume
□ seasonality (inconsistent availability)
□ inconsistent quality
□ reliability issues
□ high cost
□ difficulties / challenges with ordering
□ difficulties / challenges with delivery
□ have to order through head office
□ billing, payment, invoicing complications
□ liability concerns
□ other, specify
_____

IV. What would make it easier for you to purchase local food? _____

Local Food Procurement Practices

Interviewer note: Start by identifying the kinds of products the business/organization procures and focus on the appropriate category(ies). For example, if it is known that the business specializes in certain specialty types of food items e.g. fresh produce and/or meat products, start with vegetables or proteins and then proceed to explore other food categories from there.

10. In general, what are the main types of locally produced or harvested foods that you sell through your business operation / organization?

11. Are there any additional food items that you would be interested in sourcing locally? This could include food items that are currently grown in the area or have the potential to be grown in the area?

For the next set of questions we want to focus on a select few local food items that you noted are important to you. Again, the focus here is on food items that are grown / harvested in the area or have the potential to be grown / harvested in the area.

You mentioned that you currently source _____ locally, so let's start there.
Interviewer note: skip to the appropriate parts of the survey to continue with the questions.

Vegetables

12. I'd like to talk further about specific food categories starting with vegetables – and we want to focus on vegetables that are grown in the area or have the potential to be grown in the area.
Do vegetables play a large role in your business activity and do they represent a significant portion of your purchasing?
What vegetables do you buy the most of? This would include things like root vegetables, cabbage, broccoli, salad greens, tomatoes, onions, corn, garlic, fresh herbs, and mushrooms.

Item 1:

I. Can you tell us approximately how much of this vegetable you use on a yearly basis *(the quantity is the primary data required but $ value can also be collected if provided*)? *Interviewer note: if the respondent indicates quantity as boxes / bags / crates etc. ask if they can provide additional details e.g. number of units in a box, weight of the unit/box, etc. Is important that we capture these details for the purpose of aggregating totals across all of the participating businesses / organizations. For the purpose of the discussion it could be helpful to ask the key informant how much they procure in an average week (be sure to confirm the weight unit of measure – e.g. lbs or kgs) and then ask how many weeks of the year they procure this product.*

II. Do you procure this vegetable seasonally or year-round?
Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?

□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____
□ no

If 'yes' or 'yes, with conditions'…

How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this vegetable delivered to you?
Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.

Method of delivery:
□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up

□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week

□ Once a week □ Other conditions, specify: _____

Processed condition of product:

□ Fresh, unprocessed □ Fresh, washed

□ Fresh and semi-processed (e.g. peeled, chopped, diced, juiced, etc.), specify: _____

□ Frozen □ Frozen, washed

□ Frozen and semi-processed (e.g. peeled, chopped, diced, juiced, etc.), specify: _____

Packaging preferences (e.g. bagged, boxed, canned, on pallets), specify: _____

Units per package (e.g. lbs/bag), specify: _____

How important are food standard/consistency considerations in your purchasing decisions?

- For example, do you need unblemished, regular shaped food or foods of certain grades?
- Do you need producers / harvesters to be certified through recognized food safety programs such as CanadaGAP and/or organic food certification programs?
- Do you have a preference for this product to be produced as an outdoor field crop vs. a greenhouse crop (including hydroponics/aquaponics)?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?
Interview follow-up: What percentage?

VI. If more of this vegetable was to become available locally, would you be interested in buying more of if it (or switching to a local source)?

□ Yes □ No □ Not applicable

Item 2:

You also mentioned that you buy a lot of...

Repeat above questions I through VI. The interview could continue with more vegetables using the format above.

12. Do you currently buy / procure locally grown and/or harvested vegetables beyond the traditional growing season? For example, frozen or canned products; cold storage vegetables (e.g. potatoes, turnips, parsnips, beets, carrots)?

□ Yes □ No

If not, would you be interested and what products are you interested in?

Proteins

13. Next, I'd like to ask you about proteins / meats – and we want to focus on proteins that are grown / fished in the area or have the potential to be grown / fished in the area.

Do meats play a large role in your business activity and do they represent a significant portion of your purchasing?

What proteins do you buy the most of? This includes beef, pork, lamb/mutton, goat, chicken, turkey, duck, various fish (wild and/or cage raised) and various farmed game such as 'domestic' varieties of deer, bison, rabbit, quail etc.

Item 1:

I. Can you tell us approximately how much of this protein you procure on a yearly basis (quantity – and $ value if provided)?

II. Do you procure this protein seasonally or year-round?
Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?

□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____

□ no

If 'yes' or 'yes, with conditions'…

How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this product delivered to you?

Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.

Method of delivery:

□ Direct delivery by producer/processor to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer/processor and pick-up
□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____

Processed condition of product:

□ fresh □ frozen
□ whole □ half □ quarter
□ smoked □ cured

Primal cuts (e.g. rib, square chuck, flank, hip, veal loin, pork loin, pork shoulder, lamb leg, lamb shoulder, etc.)

Specify: _____

Sub-primal cuts / retail meat cuts / restaurant meat cuts (e.g. short ribs, t-bone steak, inside round roast, centre chops, pork side ribs, lamb shank, chicken breast – skin/skinless, chicken wings, fish fillet)

Specify: _____

Offal (e.g. by species - tongue, heart, liver, kidney, tripe, brains, blood, intestines, etc.)

Specify: _____

Packaging preferences (e.g. boxed, on pallets), specify: _____

Units per package (e.g. lbs/bag), specify: _____

How important are food standard/consistency considerations in your purchasing decisions?

- Do you need a certain quality or grade of meat product? For example, beef – Canada Prime, Grade AAA, AA, A, etc.
- Do you need producers to be certified through recognized food safety programs such as Verified Beef Production and organic food certification programs?
- Do you have a preference that the source animals be raised in a certain way? E.g. grass fed vs. grain fed, free range vs. cage raised, hormone free, etc.

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?

Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?

□ Yes □ No □ Not applicable

Item 2:

You also mentioned that you buy a lot of...

Repeat above questions I through VI. The interview could continue with more proteins.

14. Are you interested in sourcing any other proteins that you currently don't have access to, which could come from a local source?

□ Yes □ No

If so, please elaborate on the type and quantity.

Grains & Oilseeds & Pulse Crops

15. Do grains, oilseeds and pulse crops play a big role in your business activity?
This includes flour products as well as whole grains like oats and barley, pulses like lentils, chickpeas and dried beans, and seed oils like canola.
What grains, pulse crops, or oils do you buy the most of?
Item 1:

I. Can you tell us approximately how much of this product you procure on a yearly basis (quantity - and $ value if provided)?

II. Do you procure this product seasonally or year-round?
Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?
□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____
□ no
If 'yes' or 'yes, with conditions'…
How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this product delivered to you?
Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.
Method of delivery:
□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up
□ Other conditions, specify: _____
Frequency of delivery:
□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____
Processed condition of product:
□ whole grain
□ processed (e.g. refined flour - all purpose, whole wheat, self rising, gluten free; bran, rolled, flaked, meal), specify: _____
Packaging preferences (e.g. bagged, boxed, on pallets), specify: _____
Units per package (e.g. lbs/bag), specify: _____
How important are food standard/consistency considerations in your purchasing decisions?
- Do you need producers / harvesters to be certified through recognized food safety programs such as HACCP and/or organic food certification programs?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?
Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?
□ Yes □ No □ Not applicable

Item 2:
You also mentioned you used a lot of...
Repeat above questions I through VI. The interview could continue with more grains, pulse crops, and oils.

16. Are you interested in sourcing any other specialty grains, flours or oils that you currently don't have access to, which could come from a local source?
□ Yes □ No
If so, please elaborate on the type and quantity.

Dairy Products

17. Are dairy products important in your purchasing?

What dairy products do you buy the most of? This includes pasteurized fluid milk products, real butter, sour cream, cheese, yogurt, ice cream.

Item 1:

I. Can you tell us approximately how much of this product you procure on a yearly basis (quantity - and $ value if provided)?

II. Do you procure this product seasonally or year-round?

Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?

□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____

□ no

Additional comments: _____

If 'yes' or 'yes, with conditions'…

How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this product delivered to you?

Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.

Method of delivery:

□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up
□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____

Processed condition of product:

□ lactose free
□ powdered milk
□ other processed, specify: _____

Packaging preferences (e.g. bagged, cartons, on pallets), specify: _____

Units per package (e.g. litres/bag), specify: _____

How important are food standard/consistency considerations in your purchasing decisions?

- Do you need producers / harvesters to be certified through recognized food safety programs such as HACCP and/or organic food certification programs?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?

Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?

□ Yes □ No □ Not applicable

Item 2:

You mentioned you also buy a lot of...

Repeat above questions I through VI. The interview could continue with more dairy products.

Eggs

18. Do you sell eggs or egg related products through your business / organization?

What egg products do you buy the most of? This includes chicken eggs, duck eggs or other eggs as well as processed eggs such as egg yolk or egg whites.

Item 1:

I. Can you tell us approximately how much of this product you use on a yearly basis (quantity - and $ value if provided)?

II. Do you use this product seasonally or year-round?

Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?

□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____

□ no

If 'yes' or 'yes, with conditions'…

How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this product delivered to you?

Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.

Method of delivery:

□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up
□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____

Whole, unprocessed eggs:

□ small size □ medium size □ large size □ extra large size
□ white eggs □ brown eggs
□ other characteristics, specify: _____

Processed eggs:

□ liquid whole egg □ liquid egg yolk □ liquid egg whites
□ dried whole egg □ dried egg yolk □ dried egg whites
□ frozen whole egg □ frozen egg yolk □ frozen egg whites
□ other processed, specify: _____

Packaging preferences (e.g. dozen, flat/tray, on pallets), specify: _____

Units per package, specify number of eggs/package: _____

How important are food standard/consistency considerations in your purchasing decisions?

- Do you need producers / harvesters to be certified through recognized food safety programs such as HACCP and/or organic food certification programs?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?

Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?

□ Yes □ No □ Not applicable

Item 2:

You also mentioned you buy a lot of...

Repeat above questions I through VI. The interview could continue with more egg products.

Fruits and Berries

19. Do you sell a lot of fruits and/or berries through your business / organization?
What fruits/berries do you buy the most of? This includes cultivated strawberries, raspberries and blueberries, wild blueberries, crab apples, apples, including processed foods like jams and jellies.
Item 1:

I. Can you give us an idea of how much of this fruit/berry you procure on a yearly basis (quantity - and $ value if provided)?

II. Do you procure this product seasonally or year-round?
Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?
□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____
□ no
If 'yes' or 'yes, with conditions'…
How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this item delivered to you?
Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.
Method of delivery:
□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up
□ Other conditions, specify: _____
Frequency of delivery:
□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____
Processed condition of product:
□ Fresh, unprocessed □ Fresh, washed
□ Fresh and semi-processed (e.g. peeled, chopped, pitted, juiced, etc.), specify: _____
□ Frozen □ Frozen, washed
□ Frozen and semi-processed (e.g. peeled, chopped, pitted, juiced, etc.), specify: _____
Packaging preferences (e.g. bagged, boxed, canned, on pallets), specify: _____
Units per package (e.g. lbs/bag), specify: _____
How important are food standard/consistency considerations in your purchasing decisions?
- For example, do you need unblemished, regular shaped food or foods of certain grades?
- Do you need producers / harvesters to be certified through recognized food safety programs such as CanadaGAP and/or organic food certification programs?
- Do you have a preference for this product to be produced as an outdoor crop vs. a greenhouse crop (including hydroponics/aquaponics)?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?
Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?
□ Yes □ No □ Not applicable

Item 2:
You also mentioned you bought a lot of...
Repeat above questions I through VI. The interview could continue with more fruits and berries.

20. Do you currently buy / procure locally grown and/or harvested fruits / berries beyond the traditional growing season? For example, frozen or canned products; preserves; cold storage fruits (e.g. jams/jellies, apples)?

□ Yes □ No

If not, would you be interested and what products are you interested in?

Other

21. Are there any other food products that are important for your business operation / organization that we haven't already discussed including specialty foods that are currently grown or harvested or have the potential to be grown or harvested locally? (e.g. hops, commercially grown mushrooms, maple syrup, honey, wild harvested cultivated foods – mushrooms, fiddleheads, spruce tips, wild leaks, etc.)

If so, please elaborate

Item 1:

I. Can you tell us approximately how much of this product you procure on a yearly basis (quantity - and $ value if provided)?

II. Do you procure this product seasonally or year-round?

Interview follow-up: If seasonally, in what months?

III. How price-sensitive are you on this item… or to put it another way, would you be willing to pay more (a premium price) for a local option vs. a non-local option?

□ yes □ yes, but with conditions (e.g. quality, volume) – specify: _____

□ no

If 'yes' or 'yes, with conditions'…

How much more are you willing to pay for the local option in terms of $ price / per unit (or what percentage more for local)?

IV. How do you need/prefer to have this item delivered to you?

Interviewer note: Check off any of the following that apply, prompting for each of the points and document any specific details provided by the key informant where appropriate.

Method of delivery:

□ Direct delivery by producer to the back door/unloading zone
□ Direct delivery by food wholesaler to the back door/unloading zone
□ Prefer to visit the producer and pick-up
□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week
□ Once a week □ Other conditions, specify: _____

Processed condition of product, specify:

Packaging preferences, specify: _____

Units per package (e.g. lbs/bag), specify: _____

How important are food standard/consistency considerations in your purchasing decisions?

- For example, do you need unblemished, regular shaped food or foods of certain grades?
- Do you need producers / harvesters to be certified through recognized food safety programs and/or organic food certification programs?
- Do you have a preference for this product to be produced as an outdoor crop vs. a greenhouse crop (including hydroponics/aquaponics)?

V. Of the total volume of this food item that you sourced in the most recent business year, how much do you estimate was produced / harvested within the area of Algoma / Manitoulin / Sudbury?

Interview follow-up: What percentage?

VI. If more of this product was to become available locally, would you be interested in buying more of if it (or switching to a local source)?

□ Yes □ No □ Not applicable

Item 2:
You also mentioned you buy a lot of...
Repeat above questions I through VI. The interview could continue with more specialty foods.

Final Comments
That completes all of the questions that I have for the interview.

22. Is there anything we've missed in our discussion about local food that you want to share?

23. Do you have any final comments or advice for the people who are prospecting for development opportunities in the food sector?

At this time we anticipate that the final report for this study will be released in the Spring of 2019.
The Rural Agri Innovation Network will release the report through its website and there will also be public presentations.
24. Would you like to be notified about the report when it becomes available and/or notified about the public presentation?
□ Yes – only the report
□ Yes – only the public presentation
□ Yes – both the report and the public presentation
□ No – do not notify me

25. Local food producers are interested in engaging more with local food retailers, food processors, and food service businesses and organizations.
Would you be interested in networking more with local food producers and if so, could we share your contact information with them?
□ Yes – go to question 26
□ No, not at this time – go to question 27
□ No, not at all – go to question 27

26. Would it also be ok if we shared the specific details on your food types and volumes with local producers? We are planning to conduct discussion sessions with producers later in the fall.
□ Yes
□ No, only my name / contact information at this time

27. Are there any final questions you have of me?

Thank you for participating in this interview!

Appendix B: Number of Businesses in Manitoulin District by Select NAICS Classification

Food / beverage manufacturing establishments in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
31121	Flour milling and malt manufacturing	0	0	0	0	0	0	0	0	0	0
31122	Starch and vegetable fat and oil manufacturing	0	0	0	0	0	0	0	0	0	0
31123	Breakfast cereal manufacturing	0	0	0	0	0	0	0	0	0	0
31131	Sugar manufacturing	0	0	0	0	0	0	0	0	0	0
31134	Non-chocolate confectionery manufacturing	0	0	0	0	0	0	0	0	0	0
31141	Frozen food manufacturing	0	0	0	0	0	0	0	0	0	0
31142	Fruit and vegetable canning, pickling and drying	1	0	0	0	0	0	0	0	0	1
31151	Dairy product (except frozen) manufacturing	0	0	0	0	0	0	0	0	0	0
31152	Ice cream and frozen dessert manufacturing	0	0	0	0	0	0	0	0	0	0
31161	Animal slaughtering and processing	0	0	0	0	0	0	0	0	1	1
31171	Seafood product preparation and packaging	0	0	0	0	0	0	0	0	0	0
31181	Bread and bakery product manufacturing	0	0	0	0	0	0	0	0	0	0
31182	Cookie, cracker and pasta manufacturing	0	0	0	0	0	0	0	0	0	0
31183	Tortilla manufacturing	0	0	0	0	0	0	0	0	0	0
31191	Snack food manufacturing	0	0	0	0	0	0	0	0	0	0
31192	Coffee and tea manufacturing	0	0	0	0	0	0	0	0	0	0
31193	Flavouring syrup and concentrate manufacturing	0	0	0	0	0	0	0	0	0	0
31194	Seasoning and dressing manufacturing	0	0	0	0	0	0	0	0	0	0
31199	All other food manufacturing	0	0	0	0	0	0	0	0	1	1
3121	Beverage manufacturing	0	2	0	0	0	0	0	0	0	2
Total number of businesses		**1**	**2**	**0**	**0**	**0**	**0**	**0**	**0**	**2**	**5**

Source: Statistics Canada, 2018

Food retail establishments in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
44511	Supermarkets and other grocery (except convenience) stores	0	1	1	0	2	0	0	0	2	6
44512	Convenience stores	1	0	0	0	0	0	0	0	2	3
44521	Meat markets	0	0	0	0	0	0	0	0	2	2
44522	Fish and seafood markets	0	0	0	0	0	0	0	0	0	0
44523	Fruit and vegetable markets	0	0	0	0	0	0	0	0	0	0
44529	Other specialty food stores	3	0	1	0	0	0	0	0	0	4
44531	Beer, wine and liquor stores	3	0	1	0	0	0	0	0	0	4
Total number of businesses		**7**	**1**	**3**	**0**	**2**	**0**	**0**	**0**	**6**	**19**

Source: Statistics Canada, 2018

Food wholesale establishments in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
41311	General-line food merchant wholesalers	0	0	0	0	0	0	0	0	1	1
41312	Dairy and milk products merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41313	Poultry and egg merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41314	Fish and seafood product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41315	Fresh fruit and vegetable merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41316	Red meat and meat product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41319	Other specialty-line food merchant wholesalers	0	0	0	0	0	0	0	0	1	1
41321	Non-alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41322	Alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
Total number of businesses		**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**2**	**2**

Source: Statistics Canada, 2018

Food service establishments in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
72231	Food service contractors	0	1	2	0	0	0	0	0	0	3
72232	Caterers	0	0	0	0	0	0	0	0	0	0
72233	Mobile food services	0	0	0	0	0	0	0	0	2	2
72241	Drinking places (alcoholic beverages)	0	0	0	0	0	0	0	0	0	0
72251	Full-service restaurants and limited-service eating places	5	10	5	1	0	0	0	0	15	36
Total number of businesses		**5**	**11**	**7**	**1**	**0**	**0**	**0**	**0**	**17**	**41**

Source: Statistics Canada, 2018

Accommodation establishments in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
72111	Hotels (except casino hotels) and motels	4	3	5	1	1	0	0	0	15	29
72119	Other traveller accommodation	3	0	0	0	0	0	0	0	16	19
72131	Rooming and boarding houses	0	0	0	0	0	0	0	0	1	1
Total number of businesses		**7**	**3**	**5**	**1**	**1**	**0**	**0**	**0**	**32**	**49**

Source: Statistics Canada, 2018

Community food services in Manitoulin District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
62421	Community food services	0	0	0	0	0	0	0	0	0	0

Source: Statistics Canada, 2018

Appendix C: Agricultural Production in Manitoulin District

Number of Farms in Manitoulin District by Farm Area – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	258	235	201	-22.1	-14.5
Total farm area: Under 10 acres	5	8	5	0.0	-37.5
Total farm area: 10 to 69 acres	14	17	16	14.3	-5.9
Total farm area: 70 to 129 acres	27	24	30	11.1	25.0
Total farm area: 130 to 179 acres	8	12	6	-25.0	-50.0
Total farm area: 180 to 239 acres	21	21	15	-28.6	-28.6
Total farm area: 240 to 399 acres	39	37	37	-5.1	0.0
Total farm area: 400 to 559 acres	32	24	23	-28.1	-4.2
Total farm area: 560 to 759 acres	31	22	16	-48.4	-27.3
Total farm area: 760 to 1,119 acres	36	30	17	-52.8	-43.3
Total farm area: 1,120 to 1,599 acres	19	17	13	-31.6	-23.5
Total farm area: 1,600 to 2,239 acres	15	13	14	-6.7	7.7
Total farm area: 2,240 to 2,879 acres	5	7	3	-40.0	-57.1
Total farm area: 2,880 to 3,519 acres	2	-	1	-50.0	-
Total farm area: 3,520 acres and over	4	3	5	25.0	66.7

- Nil or zero

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Gross Farm Receipts for Manitoulin District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total gross farm receipts (excluding sales of forest products) in the calendar year prior to the census or for the last complete accounting (fiscal) year prior to the census - Amount $	$12,150,387	$12,684,196	$14,182,821	16.7	11.8
Under $10,000 - Farms reporting	81	86	59	-27.2	-31.4
$10,000 to $24,999 - Farms reporting	69	51	43	-37.7	-15.7
$25,000 to $49,999 - Farms reporting	39	33	30	-23.1	-9.1
$50,000 to $99,999 - Farms reporting	32	32	29	-9.4	-9.4
$100,000 to $249,999 - Farms reporting	31	25	22	-29.0	-12.0
$250,000 to $499,999 - Farms reporting	5	6	17	240.0	183.3
$500,000 to $999,999 - Farms reporting	1	1	1	0.0	0.0
$1,000,000 to $1,999,999 - Farms reporting	0	1	-	-	-
$2,000,000 and over - Farms reporting	0	-	-	-	-

- Nil or zero

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Number of Farms in Manitoulin District by Farm Type – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	258	235	201	-22.1	-14.5
Beef cattle ranching and farming, including feedlots	152	103	90	-40.8	-12.6
Dairy cattle and milk production	8	6	3	-62.5	-50.0
Hog and pig farming	0	-	1	-	-
Poultry and egg production	2	-	3	50.0	-
Chicken egg production	2	-	2	0.0	-
Broiler and other meat-type chicken production	0	-	-	-	-
Turkey production	0	-	-	-	-
Poultry hatcheries	0	-	-	-	-
Combination poultry and egg production	0	-	1	-	-
All other poultry production	0	-	-	-	-
Sheep and goat farming	4	4	1	-75.0	-75.0
Sheep farming	4	4	1	-75.0	-75.0
Goat farming	0	-	-	-	-
Other animal production	17	24	20	17.6	-16.7
Apiculture	0	3	1	-	-66.7
Horse and other equine production	8	8	3	-62.5	-62.5
Fur-bearing animal and rabbit production	0	1	-	-	-
Animal combination farming	8	10	14	75.0	40.0
All other miscellaneous animal production	1	2	2	100.0	0.0
Oilseed and grain farming	1	7	7	600.0	0.0
Soybean farming	0	-	2	-	-
Oilseed (except soybean) farming	0	-	-	-	-
Dry pea and bean farming	0	-	-	-	-
Wheat farming	0	1	1	-	0.0
Corn farming	0	-	1	-	-
Other grain farming	1	6	3	200.0	-50.0
Vegetable and melon farming	4	8	4	0.0	-50.0
Potato farming	1	1	-	-	-
Other vegetable (except potato) and melon farming	3	7	4	33.3	-42.9
Fruit and tree nut farming	1	5	4	300.0	-20.0
Greenhouse, nursery and floriculture production	5	6	5	0.0	-16.7
Mushroom production	0	1	2	-	100.0
Other food crops grown under cover	0	-	-	-	-
Nursery and tree production	0	-	1	-	-
Floriculture production	5	5	2	-60.0	-60.0
Other crop farming	64	72	63	-1.6	-12.5
Hay farming	45	58	47	4.4	-19.0
Fruit and vegetable combination farming	2	3	2	0.0	-33.3
Maple syrup and products production	..	5	6	-	20.0
All other miscellaneous crop farming	17	6	8	-52.9	33.3

Note: Farms are classified according to the predominant type of production.
.. Figures not available
- Nil or zero

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Land Tenure in Manitoulin District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area - Farms reporting	258	235	201	-22.09	-14.47
Total farm area - Acres	178,144	158,088	141,316	-20.67	-10.61
Area owned - Acres	99,637	85,468	84,286	-15.41	-1.38
Area leased from governments - Acres	3,001	x	2,975	-0.87	-
Area rented or leased from others - Acres	73,814	66,769	52,545	-28.81	-21.30
Area crop-shared from others - Acres	870	717	1,612	85.29	124.83
Other areas used by the operation - Acres	3,989	x	2,395	-39.96	-
Area of land used by others - Acres	3,167	3,794	2,497	-21.16	-34.19

- Nil or zero
x Data suppressed due to confidentiality restrictions

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Farm Land Use in Manitoulin District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total land in crops – acres	34,279	33,289	27,156	-20.8	-18.4
Total pastureland – acres	99,835	94,440	88,846	-11.0	-5.9
Woodland, wetland and other land – acres	44,030	30,359	25,314	-42.5	-16.6
Total farm area – acres	178,144	158,088	141,316	-20.7	-10.6
Percent land in crops/pasture	*75.3%*	*80.8%*	*82.1%*		
Percent land in woodland, wetland, other use	*24.7%*	*19.2%*	*17.9%*		

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Field Crop Production in Manitoulin District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area - Farms reporting	258	235	201	-22.1	-14.5
Total farm area - Acres	178,144	158,088	141,316	-20.7	-10.6
Total land in crops - Farms reporting	235	209	170	-27.7	-18.7
Total land in crops - Acres	34,279	33,289	27,156	-20.8	-18.4
Spring wheat (excluding durum) - Acres	132	345	184	39.4	-46.7
Winter wheat - Acres	x	233	176	-	-24.5
Oats - Acres	847	428	504	-40.5	17.8
Barley - Acres	2,113	1,418	1,350	-36.1	-4.8
Mixed grains - Acres	1,290	877	901	-30.2	2.7
Corn for grain - Acres	x	698	197	-	-71.8
Corn for silage - Acres	x	293	445	-	51.9
Rye (fall and spring) - Acres	0	x	x	-	-
Canola (rapeseed) - Acres	0	497	323	-	-35.0
Soybeans - Acres	0	1,093	597	-	-45.4
Flaxseed - Acres	0	-	-	-	-
Dry field peas - Acres	0	-	x	-	-
Dry white beans - Acres	0	-	x	-	-
Other dry beans - Acres	0	x	x	-	-
Alfalfa and alfalfa mixtures - Acres	12,297	11,170	8,391	-31.8	-24.9
All other tame hay and fodder crops - Acres	16,908	15,824	13,508	-20.1	-14.6
Forage seed for seed - Acres	x	192	x	-	-
Potatoes - Acres	46	39	6	-87.0	-84.6
Sunflowers - Acres	0	-	x	-	-
Buckwheat - Acres	x	x	x	-	-
Sugar beets - Acres	0	x	-	-	-
Other field crops - Acres	x	-	x	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Vegetable Production in Manitoulin District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total vegetables - Farms reporting	18	18	16	-11.1	-11.1
Total vegetables - Acres	37	99	x	-	-
Sweet corn - Acres	13	44	5	-61.5	-88.6
Tomatoes - Acres	3	4	4	33.3	0.0
Cucumbers - Acres	2	3	1	-50.0	-66.7
Green peas - Acres	1	3	x	-	-
Green and wax beans - Acres	x	3	2	-	-33.3
Cabbage - Acres	x	x	1	-	-
Chinese cabbage - Acres	0	x	x	-	-
Cauliflower - Acres	x	x	x	-	-
Broccoli - Acres	x	1	x	-	-
Brussels sprouts - Acres	x	x	-	-	-
Carrots - Acres	1	1	1	0.0	0.0
Rutabagas and turnips - Acres	x	x	x	-	-
Beets - Acres	1	2	1	0.0	-50.0
Radishes - Acres	x	x	x	-	-
Shallots and green onions - Acres	1	1	1	0.0	0.0
Dry onions, yellow, Spanish, cooking, etc. - Acres	x	-	1	-	-
Celery - Acres	0	x	x	-	-
Lettuce - Acres	1	2	1	0.0	-50.0
Spinach - Acres	x	1	-	-	-
Peppers - Acres	x	1	1	-	0.0
Pumpkins - Acres	2	x	1	-50.0	-
Squash and zucchini - Acres	1	2	1	0.0	-50.0
Asparagus, producing - Acres	x	x	x	-	-
Other vegetables - Acres	9	5	x	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Fruit / Berry Production in Manitoulin District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total fruits, berries and nuts - Farms reporting	9	14	13	44.4	-7.1
Total fruits, berries and nuts (producing and non-producing) - Acres	42	31	118	181.0	280.6
Apples total area - Acres	40	18	22	-45.0	22.2
Pears total area - Acres	x	x	x	-	-
Plums and prunes total area - Acres	0	-	x	-	-
Cherries (sweet) total area - Acres	0	-	x	-	-
Cherries (sour) total area - Acres	x	x	x	-	-
Grapes total area - Acres	x	-	x	-	-
Strawberries total area - Acres	1	x	x	-	-
Raspberries total area - Acres	x	5	x	-	-
Cranberries total area - Acres	0	-	-	-	-
Blueberries total area - Acres	0	-	x	-	-
Saskatoon berries total area - Acres	0	x	x	-	-
Other fruits, berries and nuts total area - Acres	0	1	x	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Greenhouse, Mushroom and Other Products in Manitoulin District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total area of greenhouses in use - Farms reporting	9	7	6	-33.3	-14.3
Total area of greenhouses in use - Square feet	74,567	182,000	53,329	-28.5	-70.7
Greenhouse flowers - Farms reporting	7	7	4	-42.9	-42.9
Greenhouse flowers - Square feet	70,120	x	x	-	-
Greenhouse vegetables - Farms reporting	5	3	3	-40.0	0.0
Greenhouse vegetables - Square feet	x	x	x	-	-
Other greenhouse products - Farms reporting	1	-	3	200.0	-
Other greenhouse products - Square feet	x	-	x	-	-
Total area under glass, plastic or other protection - Farms reporting	9	7	6	-33.3	-14.3
Total area under glass, plastic or other protection - Square feet	75,120	183,020	53,329	-29.0	-70.9
Total growing area for mushrooms - Farms reporting	2	3	4	100.0	33.3
Total growing area for mushrooms - Square feet	x	x	2,921	-	-
Taps on maple trees in the spring of the census year - Farms reporting	13	31	29	123.1	-6.5
Taps on maple trees in the spring of the census year – Number of taps	3,370	6,994	8,871	163.2	26.8
Honeybees - Farms reporting	3	9	13	333.3	44.4
Honeybees - Number of colonies	44	104	71	61.4	-31.7

- Nil or zero
x Data suppressed due to confidentiality restrictions

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Livestock / Poultry Inventory for Manitoulin District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total cattle and calves - Number	17,865	15,504	13,528	-24.3	-12.7
Calves, under 1 year - Number	*5,796*	*4,644*	*3,998*	*-31.0*	*-13.9*
Steers, 1 year and over - Number	*1,490*	*2,023*	*2,498*	*67.7*	*23.5*
Total heifers, 1 year and over - Number	*2,126*	*2,002*	*1,688*	*-20.6*	*-15.7*
Heifers for slaughter or feeding - Number	*1,060*	*929*	*840*	*-20.8*	*-9.6*
Heifers for beef herd replacement - Number	*811*	*927*	*671*	*-17.3*	*-27.6*
Heifers for dairy herd replacement - Number	*255*	*146*	*177*	*-30.6*	*21.2*
Total cows - Number	*8,138*	*6,571*	*5,115*	*-37.1*	*-22.2*
Beef cows - Number	*7,627*	*6,262*	*4,939*	*-35.2*	*-21.1*
Dairy cows - Number	*511*	*309*	*176*	*-65.6*	*-43.0*
Bulls, 1 year and over - Number	*315*	*264*	*229*	*-27.3*	*-13.3*
Total sheep and lambs - Number	971	1,067	959	-1.2	-10.1
Rams - Number	*53*	*37*	*45*	*-15.1*	*21.6*
Ewes - Number	*433*	*441*	*437*	*0.9*	*-0.9*
Lambs - Number	*485*	*589*	*477*	*-1.6*	*-19.0*
Total pigs - Number	x	x	533	-	-
Boars - Number	*x*	*x*	*5*	-	-
Sows and gilts for breeding - Number	*x*	*x*	*50*	-	-
Nursing pigs - Number	*x*	*x*	*122*	-	-
Weaner pigs - Number	*..*	*x*	*204*	-	-
*Grower and finishing pigs – Number **	*47*	*x*	*152*	*223.4*	-
Goats - Number	52	25	108	107.7	332.0
Rabbits - Number	N/A	x	79	-	-
Bison (buffalo) - Number	0	-	x	-	-
Elk - Number	0	-	-	-	-
Deer (excluding wild deer) - Number	x	x	x	-	-
Total hens and chickens - Number	1,425	1,288	1,844	29.4	43.2
Pullets under 19 weeks, intended for laying - Number	264	x	x	-	-
Laying hens, 19 weeks and over - Number	851	879	1,147	34.8	30.5
Layer and broiler breeders (pullets and hens) - Number	N/A	x	x	-	-
Broilers, roasters and Cornish - Number	310	184	645	108.1	250.5
Turkeys - Number	x	33	x	-	-
Other poultry - Number	48	66	83	72.9	25.8

.. Figures not available
- Nil or zero
x Data suppressed due to confidentiality restrictions
* 2006 census report nursing and weaner pigs in one category

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Milk Production in Sudbury / Manitoulin / Nipissing Region – 2007, 2011, 2016

	2007	2011	2016	% Change 2007 to 2016	% Change 2011 to 2016
Volume of milk production (kilolitres) *	16,340	14,089	12,503	-23.5	-11.3
Data for Manitoulin District only is not available. The reported figures represent aggregate totals that include East Nipissing - Parry Sound, East Sudbury - West Nipissing, and Manitoulin - West Sudbury.					

Source: Dairy Farmers of Ontario.

Table Egg Production in Manitoulin District – 2005, 2010, 2015

	2005	2010	2015	% Change 2005 to 2015	% Change 2010 to 2015
Table egg production in the calendar year prior to the census - Dozens	N/A	15,211	20,285	-	33.4
.. Figures not available - Nil or zero					

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Farm Operators in Manitoulin District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farm operators	345	300	265	-23.2	-11.7
Gender: Male - Number of farm operators	265	240	200	-24.5	-16.7
Gender: Female - Number of farm operators	75	60	60	-20.0	0.0
Number of operators on farms with one operator	180	170	145	-19.4	-14.7
Number of operators on farms with two or more operators	165	130	120	-27.3	-7.7
Age: Under 35 years - Number of farm operators	10	15	15	50.0	0.0
Age: 35 to 54 years - Number of farm operators	140	105	85	-39.3	-19.0
Age: 55 years and over - Number of farm operators	190	190	165	-13.2	-13.2
Average age of farm operators - Years	55.6	58	59	6.1	1.7

Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

Farms Direct Selling to Consumers in Manitoulin District – 2016 *

Agricultural products directly sold to consumers for human consumption - Farms reporting	42
Agricultural products directly sold to consumers for human consumption: Unprocessed agricultural products (fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) - Farms reporting	40
Agricultural products directly sold to consumers for human consumption: Value-added agricultural products (jellies, sausages, wine, cheese, etc.) - Farms reporting	16
Method used to sell to consumers directly for human consumption: Farm gate sales, stands, kiosks, U-pick - Farms reporting	35
Method used to sell to consumers directly for human consumption: Farmers' markets - Farms reporting	15
Method used to sell to consumers directly for human consumption: Community Supported Agriculture (CSA) - Farms reporting	1
Method used to sell to consumers directly for human consumption: Other methods - Farms reporting	5
* This data was not collected in previous Census periods	

Source: Statistics Canada, Census of Agriculture, 2016.