



North Central Ontario Food and Agricultural Market Study

ALGOMA REPORT
March 25, 2019



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Algoma District

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Prepared by:

The logo for Harry Cummings and Associates Inc. (HCA) features the letters 'HCA' in a large, stylized, dark red serif font. The 'H' and 'C' are connected, and the 'A' is slightly separated. The letters are bold and have a classic, professional appearance.

HARRY CUMMINGS AND ASSOCIATES INC

Executive Summary

Introduction

This report presents the findings of the North Central Ontario Food and Agricultural Market Study (NFAMS) for Algoma 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 Algoma District supports a diversity of food production activities including field crops (e.g. grains, oilseeds, potatoes, vegetables), fruits and berries (e.g. apples, pears, 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.

The flow (i.e. marketing) of locally grown food through local businesses and organizations in Algoma 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 and wineries)
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 (60%+) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group almost half feel that 'locally grown' refers to food produced specifically in Algoma 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.

Algoma 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 Algoma based businesses / organizations (60%+) 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 Algoma 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 Algoma 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 Algoma 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 *
Sweet corn	over 100,000 cobs
Carrots	over 32,000 kgs
Cucumbers	over 26,000 kgs
Tomatoes	over 5,000 kgs
Cabbage	over 6,400 kgs
Onions	over 4,700 kgs
Cauliflower	over 4,200 kgs
Potatoes	over 8,300 kgs
Lettuce	over 3,500 kgs
Apples	over 65,000 kgs
Strawberries	over 2,200 kgs
Wheat flour	over 43,000 kgs
Rye flour	over 25,000 kgs
Oats – rolled	over 500 kgs
Malt barley	over 25,000 kgs
Malt wheat	over 6,500 kgs
Hops	over 700 kgs

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Beef – hamburger	over 14,000 kgs
Beef – various cuts	over 23,000 kgs
Pork – various cuts	over 50,000 kgs
Pork – bacon	over 1,700 kgs
Pork – ground/sausage	over 2,500 kgs
Turkey – whole & cuts	over 4,000 kgs
Chicken – various cuts	over 8,300 kgs
Eggs, whole shell	over 18,000 dozen
Fresh water fish	over 6,000 kgs
Milk, fluid	over 10,000 litres
Cheese	over 600 kgs
Maple syrup	over 500 bottles

* 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.

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.

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 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.

Producers also acknowledge that they face challenges in meeting the delivery needs of buyers. It was emphasized that filling small volume orders for distant/isolated locations is not cost effective.

The other 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 fresh produce.

Other opportunities that producers feel need to be explored include:

- Examine co-marketing and co-transporting / delivery opportunities of local food products.
- Establish a cohesive 'locally grown brand' for Algoma to utilize in marketing campaigns.
- Further expand the marketing and promotion of locally grown on social media platforms.
- Promote opportunities for retailers / restaurants and producers to network.
- Secure stable / viable locations for farmer's markets and ensure that regulations are consistent across communities and followed (e.g. food certification/ grading standards)

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of Algoma 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

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 "Algoma District" can result in an incomplete list -- specific communities in the District need to be searched to extract a more complete list from the directory.

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 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

Algoma Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for Algoma to utilize in food marketing campaigns.
 - 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).

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>

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 Algoma District and includes select findings from Manitoulin 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, Mississauga 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 study¹⁰ 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 Algoma District, a total of 72 businesses / organizations were interviewed consisting of: ¹²

- 9 food processing businesses
 - Includes bakeries, prepared food processing (e.g. pasta, soups, appetizers), abattoir, butchers/prepared meat processing, breweries
- 20 food retail businesses
 - Includes supermarkets / independent grocery stores, bulk food stores, specialty stores (e.g. meat, cheese, pasta, fish)
- 33 food service businesses / organizations
 - Includes full service restaurants, cafes, diners, coffee shops, food trucks, institutions (cafeterias, food services), accommodation establishments (resorts, inns, motels)
- 10 food programs
 - Includes food banks, community kitchens, school programs, community support services (e.g. meals on wheels, services for elderly persons and people with disabilities)

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 Algoma District there are a total of 19 food / beverage manufacturing businesses, 141 food retail and wholesale businesses, and 341 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 Ste. 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 72 Algoma based businesses / organizations are located in 18 different communities. Approximately 37% of the Algoma based businesses / organizations are located in Sault Ste. Marie and 63% are located in smaller communities across the District.

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	Shesheganing 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 Canada¹⁴ 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 Algoma District?

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

The 2016 Census counted 280 farms in Algoma District, a 16% decrease from the 2006 census (335 farms). Over the same ten-year period the total reported farm area in Algoma District declined from 95,814 acres in 2006 to 74,307 in 2016, or 22%.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 280 farms in Algoma District reported a combined total of \$16.4 million in gross farm receipts.¹⁶

Agricultural activity in Algoma District is diverse and includes beef and dairy production, hog farming, poultry and egg production, sheep and goat farming, and apiculture.¹⁷ Algoma 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, pears) 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 21% of the total farms in Algoma District while mid-sized farms (70 - 239 acres) account for 42% of the total and larger acreage farms (240 acres+) account for 37% of the total farms.

Algoma District reported just over 74,000 acres of farmland in 2016 of which approximately 40% is in crop production. Major field crops in terms of total acreage include hay (24,200 acres – tame hay and alfalfa), oats (1,593 acres), corn (725 acres – silage and grain), and barley (542 acres). Other field crops grown on smaller acreages include spring and winter wheat, rye, buckwheat, canola, soybeans, peas, beans, potatoes and sunflowers.

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 Algoma District as defined by MPAC amounted to 242,993 acres which represents an additional 168,686 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 49 farms reporting growing field vegetables in 2016 amounting to 153 acres of total production. Major field vegetables grown in terms of total acreage (excluding potatoes) include sweet corn (37 acres), cabbage (17 acres), green/wax beans (10 acres), tomatoes, cucumbers, green peas, and squash/zucchini (all at 7 acres each). Other vegetable crops grown on smaller acreages include cauliflower, broccoli, carrots, onions, lettuce, beets and others. Although detailed data for greenhouse vegetable production is not available, the Census of Agriculture indicates that there was at least 13,700 sq ft of greenhouse space in vegetable production in 2016. The Census also indicates that there were at least four mushroom producers and 74 maple syrup producers in Algoma District in 2016.

Historically, there has been more activity in livestock and poultry production in Algoma District than at present. Although there continues to be activity across a broad range of animal and poultry production (e.g. beef, dairy, hogs, sheep, goats, chickens, turkeys) the overall inventories associated with these activities are in most cases lower than they were ten years ago (i.e. 2006 vs. 2016).

With respect to the farm operator profile, the total number of farm operators in Algoma District declined from 480 in 2006 to 420 in 2016. Over the last ten years there have been some notable changes in the farm operator profile. Women account for an increasing share of farm operators in Algoma District, rising from 31% in 2006 to almost 35% in 2016.¹⁹ Although the average age of farm operators in Algoma District remained unchanged between 2006 and 2016 (54 years), there has been an increase in the share of farm operators under 35 years of age (6% in 2006 vs. 11% in 2016). These changes are consistent with trends at the national level.²⁰

In 2016, 39% of all farms in Algoma District reported that they sold directly to consumers. This figure is about three times higher than the national figure.²¹ Of the 109 Algoma farms that were marketing directly to consumers in 2016, 98% sold unprocessed agricultural products (e.g. fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) while 10% sold value added products (e.g. jellies, sausages, etc.). The most common method used by Algoma farmers to sell directly to consumers is through farm gate activities (e.g. stands, kiosks, u-pick) with 102 farms participating in this type of marketing activity. A total of 32 farms reported that they sell directly to consumers through farmers' markets and 13 farms reported that they utilize Community Supported Agriculture (CSA) methods for their sales activity.²²

Note: data tables on agricultural production in Algoma 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 Algoma District

The agriculture sector in Algoma District is supported by a variety of hard and soft infrastructure assets. Hard infrastructure elements include an abattoir (Northern Quality Meats – Bruce Mines), an egg grading station (Barber Road Egg Grading Station - Desbarats), and other food processing activities across the region (e.g. ice cream/dairy, butchers, bakeries, breweries). There are also two auction establishments in the region: the Algoma Produce Auction (Desbarats) and Algoma Cooperative Livestock Sales (Thessalon).

Other hard infrastructure assets in the region include Desbarats Country Produce (a distributor of local produce from the Desbarats community), Lock City Dairies²³ in Sault Ste. Marie, and the Thessalon First Nation Biocentre.²⁴

Algoma District also features several farmers' markets including the Algoma Farmers' Market (Sault Ste. Marie), Mill Market Farmers' Market (Sault Ste. Marie), Johnson Farmers' Market (Desbarats), Hilton Beach Farmers' Market (St. Joseph Island), Iron Bridge Farmers' Market (Iron Bridge), and Sowerby Farmers' Market (Sowerby).

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

- Algoma Bee Producers Association
- Algoma Cattlemen's Association
- Algoma Dairy Producers Association
- Algoma Sheep Producers Association
- Algoma Federation of Agriculture
- Algoma Soil & Crop Improvement Association
- Ontario Sheep Farmer - District 11²⁵

The Rural Agri-Innovation Network (RAIN) – a division of Sault Ste. Marie Innovation Centre – also supports the agri-community by collaborating with industry, government and communities to develop initiatives that meet the needs of farmers and agri-food businesses.

Additional information on Algoma agri-organizations and businesses including contact information can be obtained through the FarmNorth.com web portal.²⁶

²³ This business receives its processed milk products from Farquhar's Dairy in Espanola.

²⁴ The Bio Centre is a 17 greenhouse and large cold storage facility with a certified organic food processing / packaging area. Although the current focus is on producing tree seedlings, the community is exploring organic food production opportunities,

²⁵ District 11 covers Kenora, Rainy River, Thunder Bay, Cochrane, Algoma, Sudbury, Temiskaming, Nipissing and Manitoulin.

²⁶ www.farmnorth.com/District.aspx?district_id=1&name=Algoma

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.²⁷ 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.²⁸

There are at least three fisheries in the Algoma region (all on Lake Superior): Anderson Fisheries (Wawa), Sayers Fisheries (Batchewana), and Agawa Fisheries (Batchewana).

²⁷ 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

²⁸ 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?
- How do Businesses / Organizations Define 'Locally Grown'?
- How Interested and Aware are Businesses / Organizations about Local Food?
- How do Businesses / Organizations Typically Stay Informed about Local Food Options?
- How do Businesses / Organizations Prefer to be Informed about Local Food Options?

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

- What Motivates Businesses / Organizations to Source Locally Grown Food?
- What Discourages Businesses / Organizations from Sourcing Locally Grown Food?
- What Changes or Improvements are of Interest to Businesses / Organizations?

3.3 What Food Items are Businesses / Organizations Buying?

- Vegetables
- Fruits and Berries
- Proteins
- Dairy Products
- Eggs
- Grains, Oilseeds and Pulse Crops
- Other Products

3.3.2 Food Retail

- Vegetables
- Fruits and Berries
- Proteins
- Dairy Products
- Eggs
- Grains, Oilseeds and Pulse Crops
- Other Products

3.3.3 Food Processing

- Vegetables
- Proteins
- Grains, Oilseeds and Pulse Crops
- Other Products

3.3.4 Food Programs

- Vegetables
- Fruits and Berries
- Proteins
- Dairy Products
- Use of Eggs
- Grains, Oilseeds and Pulse Crops

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

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 Algoma District, 63% 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 23% 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 Algoma District, just over a third of the representatives interviewed identified local food as being something that is produced / harvested within the boundaries of Algoma District. A further 13% 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 39% 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 Algoma District elaborated on their views of what locally grown means to them. Several individuals noted that their definition of local is community specific and the following communities were identified: Sault Ste. Marie, Elliot Lake, Blind River, Iron Bridge. The following responses illustrate the variation in range that stakeholders associate with the term locally grown.

- *I view local as food that's grown within an hour radius.*
- *Local relates to foods grown within half a mile away.*
- *Locally grown needs to be within a short driving distance.*
- *Algoma is immediate local but I consider all of Ontario to be local.*
- *Local includes anything grown along the North shore*
- *Local includes Sault Ste. Marie – Espanola – Sudbury.*
- *Local includes the area between Sault Ste. Marie and Sudbury... local also means not imported.*
- *My definition of local includes the area from Sudbury to Sault Ste. Marie.*
- *Local should be within 150 kilometers.*
- *Southern Ontario is part of our local food definition... we need to rely on some ingredients from the Elora / Fergus area.*
- *I'm unable to get organic milled flour in Algoma so I consider southern Ontario local.*
- *Local Algoma producers cannot provide the volume we need as well as the consistency of volume we require – therefore we have to source from suppliers that can – but we still attempt to emphasize the importance of freshness and try to source regionally.*
- *Nearly all of our product comes through a central ordering system. In the summer we run the homegrown Ontario promotion.*
- *Ideally, the local definition should focus on local farmers and local vendors (community based) but in practice we need to source most of our supplies from southern Ontario.*
- *Personally, I feel that local is community based but practically speaking local takes on different meanings depending of the client... we have contracts across the province including in the Algoma region.*

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 Algoma, the next most common approaches include communicating with food distributors (25%), attending farmers' markets (15%) and subscribing to relevant newsletters / social media (11%). Approximately 17% of the Algoma based representatives are currently not taking any action to stay informed about local food options. Compared to the other two districts it appears that a lower proportion of the Algoma based businesses / organizations are using farmers' markets and relevant newsletters and social media 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 Algoma District provided additional commentary on what motivates them to procure locally grown / harvested foods:

Food processor representatives

- *Local product is fresher.*

Food retail representatives

- *Local product is fresher as it travels a shorter distance.*
- *Large producers and suppliers sometimes require minimum purchase amounts which can result in food going to waste. An advantage of working with small local producers is they you can buy small quantities of items.*
- *Consumers are taking greater interest in the connection between their health what they eat... they want more information about where the product comes from and how it's been raised / treated / processed... retailers can access local producers to compile this information for their consumers.*
- *People are interested in organic products and local producers are making these food items available.*
- *Customers are looking for more variety on the shelf and local producers can provide unique products that stand apart from the products offered through the major wholesalers.*

Food service representatives

- *Local product is fresher... prefer to offer customers day fresh local than food that has travelled for several days.*
- *Interested in using and serving organic foods... and interest in avoiding the use of genetically modified foods... there is greater trust with local growers.*
- *Local producers are able to provide a variety of food products in small amounts which can help to reduce food waste.*
- *Food service operators like to know what they're putting on the table for their customers... it is important for the operators to know / understand where the food has come from, how it was produced and how it arrived at their doorstep.*
- *Important to keep commerce in the community and support the people who support the business.*
- *Intangible benefits in sourcing / providing local options to consumers - consumers become better educated about what's grown locally, they get to experience a more unique food dining experience, feel sense of satisfaction in knowing that they are supporting local businesses.*
- *Belief that most farmers don't get a 'fair shake' and so it's important to deal directly with local farmers.*

Food program representatives

- *Important to be community minded and support local producers.*
- *It's very convenient to access food items from local producers – especially in smaller, more remote communities.*

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

Food processor representatives

- *There needs to be more local value-added activity to move the raw food product further along in processing...*
 - *Although there are farmers willing to grow barley in the area, micro-breweries need to have the product processed into malted barley before they can use it... it was suggested that there could potentially be enough local micro-breweries for an investor to build a local malting enterprise to service the needs of northern brewers.*
 - *It would be ideal to have a local flour mill in the region but it's questionable whether anyone would make the investment / take on this risk.*
- *I appreciate the value of supporting local producers but we have strict quality / food safety controls for our food ingredients (e.g. HACCP, federally inspected plants, etc.) that we need to adhere to for the purpose of meeting the standards of Loblaw's, Metro, etc. and local producers typically cannot deliver on these. Most of our ingredients are sourced from Canada which we're very proud of.*

Food retail representatives

- *Concern that local food producers may not meet the requirements of health/food safety inspections.*
- *Procuring food through major wholesalers eliminates a lot of worry around whether the food has been properly handled / processed / packaged in certified and/or licenced facilities... perception that there is greater risk of liability issues with locally grown vs. major wholesalers.*
- *Greater availability and variety of food items is offered through major wholesalers.*
- *There needs to be better communication from producers to understand when they have stock ready for slaughter/market.*
- *It was suggested that the local meat processing facilities need to be more competitive in pricing their services to support competitive pricing as the product moves through retail.*
- *Ownership has not fully bought into the philosophy of supporting local.*

Food service representatives

- *The short seasonal availability of local food (e.g. four months) requires businesses to have other procurement options.*
- *General inconvenience of having to source food items from multiple local producers... vs. the convenience of sourcing all or most of their needs from one supplier (e.g. major wholesaler).*
- *Menu planning can be difficult with the uncertainty of local food availability and issues around the consistency of the food quality.*
- *Businesses that are remotely located from local producers have challenges with reliable delivery.*
- *Local food needs to be reasonably priced... margins are tight in the restaurant sector and not all customers are interested and/or have the capacity to pay a premium price for local on the menu.*
- *Some businesses only want to buy very small amounts of product... it was suggested that some local producers are not interested in catering to small batch purchases.*
- *Concern that local food producers are not able to meet food certification needs.*

- *Certain foods are more problematic to source locally due to government health / safety regulations – e.g. meats, dairy, eggs. Additionally, meat suppliers in the area are not able to supply the cuts of beef that I want and it's easier to work through the big wholesalers... I attempt to get as much from Ontario based farms as possible.*

Food program representatives

- *Food programs operate on small budgets with little flexibility... food donations are important and when food is purchased it needs to be reasonably priced.*

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?

Algoma District representatives offered their suggestions on possible actions that would further enable their ability to procure locally grown or harvested foods.

Food processor representatives

- *Locally grown foods need to be competitive on price... I want farmers to make money but most local producers are working on small scale operations so they need to charge more and I can't pass on high costs to clients – people will go elsewhere.*
- *In general, local producers need to expand the volume of their production and keep their prices competitive.*
- *Although there are farmers willing to grow barley in the area, I need someone to process it into malting barley and no one is providing this service/product locally. There is now a cluster of micro-breweries in northern Ontario and it might be worth looking into whether it's feasible to establish a malting facility in the region.*
- *I need producers to maintain standards in beef production genetics, animal treatment, and feed protocols - if the product is to command a premium price under our branding.*

Food retail representatives

- *The locally grown products need to be reasonably priced... only a small percentage of people are willing to pay more for local.*
- *More information needs to be provided on what's available and the price for locally grown needs to be more competitive.*
- *The main issue is supply – there needs to be more volume and it needs to be provided in consistent amounts.*

- *There needs to be a better delivery system (e.g. more consistent, more frequent delivery) and better communication related to availability. For example, a lot of people like to do pig roasts in the summer, but they need to be aware that they have to put their order in two weeks in advance.*
- *Delivery / distribution issues need to be addressed – an efficient system is needed to transport locally grown foods to buyers. This is especially important for businesses that are located in more remote communities and transportation can be very costly.*
- *I'm generally pleased with the quality and selection of locally grown foods but the volume of production needs to be increased.*
- *It would be ideal if locally grown food could be distributed through a central system. Also, food distributors need to do more to draw attention to the 'local brand' options e.g. promote them in a unique manner to get the interest of retailers.*
- *Food retailers are required to meet a wide range of food safety standards and to continually update their practices... these requirements are costly. Handling locally grown foods can add to costs depending on the amount of additional processing required. It would be helpful if the government could alleviate some of these costs (e.g. offer subsidies).*

Food service representatives

- *A local distributor would be helpful... I typically get produce at the farmers' market once or twice a week but if I need to get something in between the market days I would have to drive a long way to pick it up.*
- *Having a local distributor would be amazing.*
- *Having the food delivered would be helpful but there's also a need for more promotion of what's being grown locally and where/when it's available. There's a farmer's market in Blind River, but the farmers there don't sell in bulk.*
- *Growers / suppliers have to be willing to deliver.*
- *I need to have locally grown products delivered.*
- *Delivery is important and high-quality products. I don't mind purchasing items that are only available seasonally because I can use them for feature menus. But I need to have consistent quality and delivery for the relationship to work.*
- *The area needs a local food network... it's difficult to know what's grown and available in the area unless you make connections yourself. I'm very proactive about local food but unfortunately there is no delivery system in the area which requires me to run out and pick up the food from different farmers.*
- *Local producers could try using a sales representative to market their products.*
- *The food distributors in the region need to better promote the local food options they have to increase awareness.*
- *More regular hours need to put in place at farmers' markets*
- *I would like to have a website (a hub) that I could check every week to see who has what and what the price points are... convenience is important and the best scenario is where I can go online and shop and order and get the food delivered. I don't have the time to visit the farmers' market or the farmer to pick-up the food.*
- *The marketing of locally grown food needs to be improved... I need to hear from the producers what they have available – ideally this would consist of a pricing and product list (daily or weekly) to know what's available.*
- *Local production of some food items is very limited or non-existent... would like to see a local potato grower. I'm currently shipping potatoes in from southern Ontario.*

- *Some producers require a minimum purchase of product (e.g. meat products) and this is beyond what we can use and would result in waste. We need smaller units of product – i.e. smaller units of minimum purchase. I'm not sure if there are any greenhouses in the area but this would be a useful addition to supply vegetables for longer periods of the year.*
- *If there were local greenhouse operations it would be great to access fresh produce all year long.*
- *Certain foods are more problematic to source locally due to government health / safety regulations – e.g. meats, dairy, eggs. Additionally, meat suppliers in the area are not able to supply the cuts of beef that I want and it's easier to work through the big wholesalers... I attempt to get as much from Ontario based farms as possible.*
- *Food safety / certification is especially important... I would like to see more progress from local producers in this area. We also need the growers to do what they can to facilitate convenient delivery / distribution processes. Finally, it's important for producers to price their products reasonably as it's difficult to pass on / absorb prices that are significantly higher than options from southern Ontario, other parts of Canada. We procure large volumes of food for our customers so there is the potential for a local producer to supply a significant amount if they can meet our needs/interests.*
- *Locally grown foods need to be reasonably priced / more affordable.*

Food program representatives

- *It would be helpful if locally grown foods could be channeled through a single distribution centre.*
- *We rely mostly on donated foods and we have very limited budget for buying food... we need to source food at a reasonable price and the locally grown products are not typically the most competitively priced.*
- *Our ability / capacity to handle locally grown foods, especially perishable goods, is limited by our storage space and equipment. We would like some place that's bigger with more freezer space... we try not to turn anything away but sometimes we can't help it with our space limitations.*

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 **Algoma District only**. Interested stakeholders are encouraged to review the separate reports that were prepared for Manitoulin 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 in each District.

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 share information on their food procurement practices as part of this study. A total of 32 food service respondents from Algoma were interviewed, identifying: vegetables, fruits and berries, proteins, dairy products, eggs, grains, and other products (i.e. beer, coffee, and maple syrup) as primary food items that they were either currently sourcing locally or had an interest in sourcing locally.²⁹ This section provides an overview of the primary food items identified by food service representatives; highlighting the food items sourced in the largest quantities, and providing high-level details on processed conditions, delivery, and price as well as participants interest in procuring these food items from a local source.

Vegetables

Regarding the procurement of local vegetables, potatoes made up the largest vegetable commodity, referred to by food service representatives, with respondents reporting over 42,000 kilograms (kg) of potatoes used annually, and over 34,000 kg sourced locally (see table 18). Food service respondents indicated that they source potatoes both seasonally (5 out of 11 respondents) and year-round (6 out of 11). The majority of demand is for a product that is fresh and unprocessed and/or fresh and pre-washed (10 out of 11) as food service representatives prefer to process the potatoes (i.e. fresh cut fries or mashed potatoes) in house. When asked about price sensitivity, the responses varied with nearly half (5 out of 11) saying that they would be willing to pay a premium price (up to 20% more) for a local product. Consistent quality was a major factor for many interviewees, who said that they give some allowances for small blemishes, but that potato size and starch levels need to be consistent.

The second largest vegetable commodity, referenced by food service representatives, was onions – with a reported 6,884 kg sourced annually, of which 2,145 kg was sourced from local producers (see table 18). Most interviewees said that they wouldn't be willing to pay more for this product and/or that the cost was the same or cheaper to purchase locally (5 out of 7). Of the two respondents who said that they would be willing to pay more for a local product, one indicated that they would be willing to pay up to 10% more and the other said between 10-20% more. As with potatoes, interviewees expressed a preference for an unprocessed product (7 out of 7), typically packaged in bags (5 out of 7) and delivered once or twice a week by either the producer or through a wholesaler (6 out of 7). Procurement activity for onions was split, with half the respondents saying that they procured this item year-round (4 out of 7) and half saying that they only purchase onions seasonally (3 out of 7).

Tomatoes represent the third largest vegetable commodity comprising of 6,251 kg sourced annually – 2,145 kg of which was sourced locally (see table 18). Interviewees all stated a preference for a fresh and unprocessed and/or fresh and washed product. All but two respondents stated a preference for direct delivery to the restaurant. Packaging preferences varied with respondents saying that their tomatoes typically come boxed or bagged with weights varying between 2-13kg. All of the interviewees said that they typically have their tomatoes delivered once or twice a week. When asked how price sensitive they were to this item, six out of eight said that they would be willing to pay a premium price for a local product – stating increased quality and freshness as a benefit to purchasing tomatoes locally. Half of the respondents who indicated a willingness to pay extra said that they'd be comfortable with up to

²⁹ Note that respondents were asked to report on the amount of product that was being produced locally however in some instances where the respondent did not know where the product was being produced, they spoke to items that were purchased locally. As a result, quantities are referenced as the amount that was currently being "sourced" locally (i.e. either produced or purchased from a local vender).

10% more (3 out of 6) while the other half said they'd be willing to pay up to 20% more (3 out of 6) for a quality product. Most of the respondents said that they source tomatoes year-round (7 out of 10) with a few saying that they only source tomatoes when they are in season (3 out of 10).

Cabbage was the fourth largest vegetable commodity identified in the food service industry, with representatives reporting 1,110 kg of locally produced cabbage sourced every year (out of a 4,285 kg total) (see table 18). Out of the four representatives who cited cabbage as a main produce item, three said that they use it year-round and only one said that they source cabbage seasonally. None of the interviewees indicated a willingness to pay a premium price for local cabbage, with one noting that the cost was comparable when purchasing it locally. Unlike the other produce items, respondents said that they typically only order cabbage as needed with the average frequency ranging from once a week to once every couple of weeks. Interestingly, half of the respondents said that they are willing to pick up this item from the producer while the other two said that they have it delivered either from a producer or wholesaler. As with the other produce items, respondents expressed a preference for a fresh and unprocessed product. Packaging quantities also ranged from 4-12 kg per case.

Lettuce was the fifth largest vegetable product, with a reported 3,689 kg purchased a year. Of the total amount purchased however, only 93 kg reportedly came from local producers. Out of the seven interviewees who reported using this product, four were getting their lettuce delivered from a wholesaler while only three were having their lettuce delivered directly from a producer. Delivery preference ranged from once to twice a week and five out of the seven interviewees said that they source lettuce year-round. Even though only a small percentage of this product was sourced locally, food service representatives expressed an interest in purchasing more of this product locally, with four out of six saying that they'd be willing to pay a premium price for a local product. Receiving consistent, high quality, products was a reoccurring comment with interviewees preferring lettuce that was fresh and unprocessed/fresh and washed with minimal packaging (i.e. delivered in a box/case or a bag).

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

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Potatoes	42,067	34,059	8,008	Kg
Onions	6,884	2,145	4,739	Kg
Onions	114	-	114	Cases
Tomatoes	6,252	1,322	4,930	Kg
Cabbage	4,286	1,111	3,175	Kg
Lettuce	3,689	93	3,596	Kg
Lettuce	114	-	114	Cases
Carrots	2,005	401	1,604	Kg
Carrots	400	-	400	Cases
Cauliflower	1,347	54	1,293	Kg
Watermelon	1,306	653	653	Kg
Broccoli	373	15	357	Kg
Cucumbers	305	197	109	Kg
Mixed Greens	278	160	119	Kg
Kale	245	44	201	Kg
Bell peppers	236	147	89	Kg
Spinach	165	103	62	Kg

Mushrooms	134	75	59	Kg
Beans	127	63	63	Kg
Squash	113	108	5.6	Kg
Fiddleheads	2.3	2.3	-	Kg
Mushrooms	2.3	2.3	-	Kg
Corn	13	11.5	1.5	Kg

Food Standard & Delivery Preferences (All Vegetable Summary)

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

Food standard preferences – Food service representatives were asked to comment on the types of food standard/consistency considerations that were most important to them when making purchasing decisions. The food standard consideration mentioned most often was having products that were certified by a recognized food safety program (35 out of 41 products³⁰). This was followed by a preference for produce that was unblemished and/or of a consistent shape/size and highly graded products (mentioned 28 and 22 times respectively). A smaller number of respondents expressed preferences for outdoor field crops (10 out of 41) and produce that is certified organic (12 out of 41). Several respondents did note that produce doesn't have to be perfect, stating that they can still use items that have small bruises or blemishes in their dishes, but that in general they expect consistent, high quality, products from their suppliers.

Delivery preferences – Food service representatives generally indicated a preference for produce items to be delivered to the restaurant – either by the producer (27 out of 41) or by a wholesaler (36 out of 41). A small number of respondents did say that they are willing to pick up product from the producer; particularly when the farm was close to their business and/or conveniently located for pick-ups. Frequency of delivery also varied across interviews with larger restaurants indicating that they have their products delivered several times a week and smaller restaurants ordering products on an 'as needed' basis.

Fruits and Berries

Food service representatives identified strawberries and apples as the top fruit and berry items sourced throughout the year. Strawberries were the largest fruit/berry item, with interviewees reporting 470 kg and 270 flats used annually – of which 395 kg was locally sourced (see table 19). Out of the four food service representatives who reported using strawberries, three source strawberries seasonally and one year-round. All four said that they prefer direct delivery from producers/wholesalers, however one did say that they will go to the producer to pick up the product. Deliveries typically take place several times a week (3 out of 4) with one specifying a need for weekly deliveries. Respondents typically prefer a product that is either fresh and unprocessed (2 out of 4) or fresh and pre-washed (2 out of 4) and delivered in either boxes/pints or crates. When asked about price, three out of four said that they would be willing to pay more for a local product (with 2 specifying up to 10% more and one up to 20% more). All the interviewees said that they would be interested in sourcing more local strawberries should they become available.

³⁰ This number relates to the total number of datapoints given to each produce item as interviewees were given the opportunity to report on multiple commodities – each with their own delivery preferences. These numbers therefore represent a single commodity datapoint rather than referencing the number of respondents interviewed.

Apples were the second largest fruit item mentioned by interviewees, who reported procuring 235 kg annually – 212 kg of which was sourced locally (see table 19). This quantity was used by a single business who purchased apples year-round. They also indicated a need for a fresh and washed product, delivered once a week by the producer and/or wholesaler. When asked about price, the interviewee said that they would be willing to pay up to 10% more for local apples and that they are interested in sourcing more apples should they become available.

Table 19: Amount of Fruit Sourced by Food Services (n=8)

Fruit	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Strawberry	472	395	77	Kg
Strawberry	270	-	270	Flats
Apple	236	212	24	Kg
Raspberry	520	351	169	Pints
Blueberry	520	351	169	Pints
Blackberries	520	351	169	Pints

^a Purchased from a local retailer

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 – Food service representatives identified organic certification as a primary food standard preference (5 out of 11 products) followed by products that are unblemished and regularly shaped or of a certain size (3 out of 11). Only one respondent said that their fruit must have the proper food safety certification and another commented that they don't have any specific food standard preferences as long as the products are a good quality product, are fresh, and can last up to a week.

Delivery preferences – Respondents generally preferred to have fruit/berry orders delivered directly to the restaurant (11 out of 11) with only three instances where interviewees said that they preferred to pick up the order directly from the producer. Orders typically came in once to twice a week (while the berries were in season). Packaging and weight preferences varied greatly across individuals based on their order needs with orders delivered in boxes, crates, pints or flats.

Proteins

Beef was the largest protein product sourced by food service representatives in Algoma. Interviewees estimated sourcing over 55,500 kg of beef annually with 72% (40,900 kg) sourced from local producers (see table 20). Out of the 18 respondents who reported beef as a primary protein product, 11 said that they source beef year-round and 7 said that they source beef seasonally. When asked about delivery preferences, respondents said that they typically have beef delivered 1-2 times a week with 12 out of the 18 respondents saying that they need the product to be delivered directly from the producer and/or wholesaler. All the respondents said that they want the beef delivered fresh – with two saying that they purchase a mixture of fresh and frozen beef. Packaging preferences ranged from vacuum sealed (15 out of 18) to wrapped in butchers' paper (2 out of 18) with smaller meat packages delivered in larger bags or boxes. Package weights ranged from 2-24 kg depending on the product. When asked about price, nine respondents said that they would be willing to pay more, two said that the cost is the same and/or cheaper, and four said that they would not be willing to pay more. Of those who said they

would pay more, three said that they'd pay up to 10% more, one said 11-20% more, and two said between 40-50% more. Interviewees also expressed an interest in sourcing more local beef with 14 out of the 18 respondents saying that they'd be interested in purchasing more under the right circumstances.

Fish was the second largest protein item identified by food service representatives at over 9,800 kg and 1,500 whole fish sourced annually – of which over 5,200 kg was sourced locally (see table 20). Of the 11 respondents who spoke to this product, eight said that they source fish year-round and three said that they only source it seasonally. As with the beef, food service businesses typically need their products delivered directly to them, with only 3 out of the 11 respondents saying that they were willing to pick up the fish from the producer. Processing preferences indicated a preference for fish that is fresh and packaged on ice (8 out of 11) or frozen (5 out of 11). When asked about price 8 out of 11 said that they would be willing to pay more under the right conditions with four respondents indicating that they would be willing to pay up to 10% more and three saying that they'd be comfortable with upwards of 30%. Just over half (6 out of 11) of respondents said that they would be interested in purchasing more local fish should it become available.

Pork was the third largest protein item mentioned by respondents at over 5,500 kg of pork sourced annually (see table 20). Unlike the first two commodities, only 90 kg of the 5,500 kg total was estimated to have been sourced locally. Most of the respondents said that they purchase pork year-round (8 out of 10) with just over half saying they prefer to have the meat delivered directly to them (6 out of 10) in bags or boxes (9 out of 10). Half of the respondents said that they need a fresh and unprocessed product (5 out of 10) with four saying that they purchase frozen pork, and two saying that they purchase their meat smoked or cured. When asked about price, seven interviewees said that they would be willing to pay up to 10% more for a locally produced product with many saying that they would be interested in purchasing pork locally (7 out of 10).

Table 20: Amount of Proteins Sourced by Food Services (n=40)

Proteins	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Beef	55,538	40,943	14,595	Kg
Beef	576	96	480	Units/Cuts of Meat
Fish ^a	9,844	5,224	4,620	Kg
Fish	1,560	-	1,560	Whole Animal
Pork	5,592	91	5,501	Kg
Pork	240	240	-	Units/Cuts of Meat
Pork	12	12	-	Whole Animal
Chicken	4,831	943	3,888	Kg
Chicken	4,260	3,900	360	Whole Animal
Turkey	2,948	-	2,948	Kg

^a wild and/or cage raised

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 – Proper food safety certification was the food standard requirement mentioned by all the food service interviewees (40 out of 40 products). The second most commonly referenced food standard preference was highly graded meat products (i.e.

grade A or above), mentioned 32 times. Protein products that came from animals who were grass fed or free range was also mentioned by a number of interviewees (16 out of 40) with one interviewee noting they “like animals to have good and healthy exercise.” Some of the other preferences noted by food service representatives were wild vs farmed fish (2 out of 40) and consistent weights for hamburger patties for consistent cooking times (1 out of 40).

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

Beef	Fish	Pork	Chicken	Turkey
Whole animal (various cuts)	Whole fish	Whole Animal (various cuts)	Whole bird	Whole bird
Steaks	Fillets	Pork loin	Chicken breasts	
Beef loin		Bacon	Chicken thighs	
Striploin		Ham		
Bottom round		Sausage		
Eye round				
Roast Beef				
Short ribs				
Hamburger				
Ground beef				

Delivery preferences – The majority of food service businesses require direct delivery from a producer/wholesaler (34 out of 40 products) with only seven respondents indicating that they will travel to the producer to pick up a protein item. This is unsurprising due to the fact that fresh meat products require transportation in a refrigerated van. Package weights varied on average between 4-8 kg per portion with respondents specifying that they come delivered boxed, bagged, or vacuum sealed depending on the processed condition of the meat and health and safety requirements.

Dairy Products

Food service representatives identified milk, chocolate milk, cream, and ice-cream as the largest dairy products sourced. Liquid white milk was the largest dairy product at 13,600 liters sourced annually, with over 2,600 liters locally sourced (see table 21). Most of the food service representatives reported procuring milk year-round (4 out of 5), delivered directly to them (4 out of 5), once or twice a week (4 out of 5). When asked about price, all the respondents said that they wouldn't be willing to pay extra for local milk – with some pointing out that supply management of dairy helps to keep costs comparable (2 out of 5) – and only three respondents said that they would be interested in procuring more local milk if it were to become available.

Chocolate milk was the second largest dairy product discussed by interviewees who reported sourcing over 5,100 liters annually – nearly 4,900 kg of which was procured locally (see table 21). Interviewees procured chocolate milk both seasonally (1 out of 2) and year-round (1 out of 2). As with the white milk, interviewees expressed a need for chocolate milk to be delivered on a weekly basis and packaged in 500 ml, 1-liter, and 2-liter cartons. When asked about cost, both said that the price would have to be competitive, and only one of the two interviewees expressing an interest in switching to a local source if it were to become available.

Cream was the third largest dairy product sourced by food services who reported sourcing 4,100 kg of cream annually and 1,200 kg of local cream (see table 21). All of the interviewees reported sourcing cream year-round and half stated a preference for the cream to be delivered

to them by a producer and/or wholesaler. Packaging preference varied between 1-2 liter cartons with one interviewee saying that they purchase the small 11ml creamers. When asked about price all of the interviewees said that cream would have to be price competitive, with three out of the four saying that they would be interested in sourcing more local cream should it become available.

Table 21: Amount of Dairy Sourced by Food Services (n=17)

Dairy	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Milk	13,661	2,676	10,985	Liters
Chocolate Milk	5,130	4,896	234	Liters
Cream	1,450	1,240	211	Liters
Ice cream	1,426	1,239	187	Liters
Cheese	660	-	660	Kg
Cream	412	319	93	Kg
Butter Milk	208	208	-	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 – Food service representatives were asked which food standard preferences were important to them when making purchasing decisions (i.e. health and safety certification, organic certification, etc.). All of the interviewees said that they need their dairy products to be certified through a recognised food safety program (i.e. HACCP) (17 out of 17 datapoints). None of the interviewees indicated that having an organic certification for their dairy products was a priority.

Delivery preferences – Nearly all the interviewees expressed a preference for dairy products to be delivered directly either by the processor or wholesaler (11 out of 17) once or twice a week (8 out of 17). For the milk and/or cream products, interviewees purchased 500 ml, 1, 2, and 4-liter cartons. Butter was purchased in 1 kg and 3.5 kg packages and ice-cream was purchased in 4-liter tubs.

Eggs

Food services representatives reported sourcing approximately 13,500 dozen eggs per year – of which 3,200 dozen eggs were sourced locally. Of the ten interviewees who spoke to their egg procurement practices 7 said that they source chicken eggs year-round. The most common type of egg used by food service providers were large white chicken eggs (7 out of 10) which they typically ordered in crates of 15 dozen (6 out of 10). All but one food service representative said that they prefer their eggs delivered directly to the restaurant. Delivery frequencies ranged from once a week (8 out of 10) to several times a week (1 out of 10) with one interviewee saying that they purchase eggs on an ‘as needed’ basis. Regarding food standard preferences, food safety certification was mentioned most often as a primary food standard requirement (8 out of 10); organic certification, graded eggs, and eggs from free range chickens were also mentioned by respondents.

When asked about price, 6 respondents said that they would be willing to pay extra for local eggs, with half saying that they would be comfortable with a 10% increase in price and the remaining saying that they’d be comfortable with 11-20% and 21-20% increases respectively.

When asked if they would be interested in sourcing more of their eggs locally, 7 out of the 10 respondents said that they would be interested in switching provided the producer could keep up with quantity and quality demands.

Grains, Oilseeds and Pulse Crops

Food service interviewees identified wheat flour and breads as the primary grain products sourced annually. At 4,680 loaves sourced annually white and brown loaves are the most common bread items sourced by the food service industry followed by mixed breads and milled oats (see table 22).

Table 22: Amount of Grains Sourced by Food Services (n=6)

Grains	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Wheat ^a	4,680	-	4,680	Loaves
Wheat ^b	240	-	240	Kg
Wheat ^c	132	-	132	Bags
Mixed Breads ^d	784	-	784	Bags
Mixed Breads	26	-	26	Loaves
Oats	520	-	520	Kg

^a Breads (i.e. white, brown, multigrain, etc.)

^{b&c} Flour (i.e. all purpose, brown, whole wheat)

^d White, Brown, Kaiser roles, English Muffins, etc.

Out of the six food service representatives interviewed, four indicated that they source grain products (i.e. wheat, breads, oats) year-round. Bread and flour orders were typically delivered once or twice a week by a wholesaler (4 out of 6) with the exception of gluten free products which several respondents said were picked up once a month (3 out of 6). Although none of the respondents purchased their grain products locally, one did say that they picked up their breads from a local grocer.

All of the interviewees said that having the proper food safety certification was an important food standard for them. Respondents pointed out that food safety was particularly important when purchasing gluten free products. Nearly all the respondents said that they would be interested in purchasing their grain products locally (5 out of 6). Price was an important consideration with only two respondents saying that they would be willing to pay a premium price (up to 10% more) for a local product with the remaining interviewees saying that the cost would have to be comparable to what they're paying now.

Other Products

Regarding the procurement of 'other' products, food services identified beer, roasted coffee, and maple syrup as primary food items that they are either currently sourcing locally or would be interested in sourcing locally (see table 23). Beer was the top item sourced by food services, with 2,840 liters sourced locally every year. Coffee and maple syrup were also sourced in decent amounts with interviewees sourcing 178 kg of coffee and 165 liters of maple syrup every year. All four interviewees said that they source these products year-round and half said that they would be willing to pay more for local products (30% or more for beer and coffee). When asked if they would be interested in sourcing more all but one (coffee) said that they would be interested in sourcing more.

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
Beer	2,840	2,840	-	Liters
Coffee	178	60	118	Kg
Maple syrup	165	165	-	Liters

Food Standard & Delivery Preferences (All 'Other' Product Summary)

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

Food standard preferences – When asked about food standard preferences all interviewees said that having the proper food safety certification was important to them. In addition, certified organic was also mentioned as a preference for local coffee.

Delivery preferences – Food service interviewees all had their 'other' products delivered to them either by a producer or a wholesaler (4 out of 4). Packaging and delivery frequencies varied by product with coffee delivered in bags every other week, maple syrup delivered bottled in cases bi-annually, and beer delivered both in kegs and in 12 can cases every two weeks.

3.3.2 Food Retail

Food retail representatives were invited to share information on their food procurement practices. A total of 23 respondents were interviewed from Algoma. The top food categories they identified were vegetables, fruits and berries, proteins, dairy products, eggs, grains, and other products (i.e. maple syrup, tea, and honey). These items represent products that Algoma 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

The top three produce items identified by food retailers were corn, cabbage, and cauliflower – with corn making up 84% of the total quantity of vegetables sourced annually by Algoma retailers. Out of the 16 retailers interviewed, two identified corn as a primary produce item, reporting that they purchase over 56,500 kg of corn annually (see table 24). These retailers expressed a preference for a fresh product, delivered in boxes or crates, directly to their store. When asked about their willingness to pay more both said that they need their products to be price competitive. At the time of the interview, neither of them sourced their corn locally but said that they might be interested in purchasing local corn under the right circumstances. Both said that they would need their corn to be food safety certified, price competitive, and delivered directly to the store, with one acknowledging the importance of location from the farm to the store, noting that “*transportation alone in the region can lead to a 30% additional cost to local farmers.*”

The second largest vegetable product reported by retailers was cabbage, with interviewees purchasing over 4,000 kg annually – 836 kg of which was purchased locally (see table 24). Retailers expressed a preference for this product to be delivered fresh and unprocessed and/or

fresh and washed in 20kg boxes or bags. Out of the three retailers who identified cabbage as a primary produce item, one said that they source cabbage year-round while the other two said that this is a seasonal item. As with the corn, retailers were sensitive to price saying that the cost would have to be the same and/or cheaper for them to be willing to switch suppliers.

The third largest vegetable item reported by food retailers was cauliflower, with one retailer reporting that they sourced over 2,900 kg annually (see table 24). This respondent said that they prefer to have the cauliflower delivered, by a wholesaler, several times a week. When asked about packaging preferences they said that they typically get the cauliflower delivered in boxes (12 heads to a case) with the product fresh and pre-washed. The retailer also said that this is a seasonal product for them and that it is all purchased outside of Northern Ontario. When asked about pricing they said that it would have to be price competitive for them to consider switching producers.

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

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Corn	56,582	-	56,582	Kg
Cabbage	4,151	837	3,314	Kg
Cauliflower	2,939	-	2,939	Kg
Lettuce	780	780	-	Bags
Lettuce	142	-	142	Kg
Pumpkin	612	-	612	Kg
Kale	360	360	-	Bags
Beans	231	122	109	Kg
Carrots	218	-	218	Kg
Garlic	192	43	150	Kg
Potatoes	163	-	163	Kg
Peas	116	116	-	Kg
Tomatoes	71	-	71	Kg

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 – The food standard requirement mentioned most frequently by retailers was certification through a recognised food safety program (i.e. CanadaGAP) (11 out of 15 products). This was followed by a preference for vegetable items that are regular shaped/grade A+ and unblemished (6 out of 15). Organic certification was less important for most retailers – many of whom said that even when costumers say that they want organic their purchasing patterns still favour the cheapest shelf item – with only three expressing a preference for an organic product.

Delivery preferences – Food retailers indicated a preference for produce items to be delivered directly to their store, either by the producer or a wholesaler, once or twice a week (15 out of 15 products). Out of all the retailers interviewed, a third said that they wanted produce deliveries scheduled for less than once a week and/or as needed. As with the top three produce items, all of the retailers indicated that they wanted their vegetable products to be delivered fresh and unprocessed (15 out of 15) or fresh and washed (9 out of 15).

Fruits and Berries

Regarding the procurement of fruits and berries, retailers identified strawberries and apples as the main fruit items, sourcing approximately 2,260 kg and 43 kg respectively (see table 25). Strawberries were the largest fruit/berry item procured by retailers, none of which was currently sourced locally. Of the three retailers who spoke to this food item, two said that they source strawberries seasonally and one said that they procure them year-round. When asked about price, two said that they wouldn't be willing to pay more – anticipating that the cost would be comparable – and one said that they would be willing to pay up to 20% more for local strawberries under the right circumstances. All three retailers said that they would need the berries to be delivered, either by the producer or a wholesaler, once or twice a week. When asked about processed and packaging preferences, all retailers expressed a need for fresh and unprocessed and/or fresh and washed berries, packaged in pint sized containers in a box. Out of the three retailers interviewed, two said that they would be interested in switching to a local source for strawberries, should they become available.

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

Fruit ^a	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Strawberry	2,268	-	2,268	Kg
Apple	44	-	44	Kg

^a Blueberries were also identified by some retailers however no quantities were specified.

Food Standard & Delivery Preferences (All Fruit Summary)

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

Food standard preferences – Retailers spoke to a general need to have products delivered unblemished and of a consistent quality (i.e. shape, size, grade) as the most important food standard consideration (4 out of 6 products). One noted that they can expect some minor variances in quality from one order to the next and generally doesn't mind a few blemished products as long as they can sell it at a reduced rate; however, another noted that the quality has to be consistent every time or else they will take it up with the supplier.

Delivery preferences – All of the retailers expressed a need for fruit/berry products to be delivered directly to them by either the producer (5 out of 6 products) or a wholesaler (3 out of 6). Delivery preferences ranged from once a week (1 out of 6) to several times a week (4 out of 6) with one retailer saying that they get daily fruit deliveries when the product is in season.

Proteins

Food retail representatives identified chicken, pork, beef, and fish as the primary protein items sourced throughout the year. Chicken was the main product sourced at over 143,000 kg of chicken annually (1,630 kg produced locally) (see table 26). Most interviewees reported sourcing chicken year-round (4 out of 5) and delivered directly to the store by a producer or wholesaler. When asked about processing preferences, nearly all the retailers said that they prefer fresh chicken (4 out of 5) as opposed to frozen (1 out of 5) with two retailers specifying that they purchase whole birds. Packaging preferences varied across stores, with producers saying that chicken comes in bagged, boxed, or vacuum sealed. As for price, three out of five retailers said that they would be willing to pay more for local chicken (with one saying up to 10% more and two saying up to 50% more), and four out of five retailers said that they would be interested in sourcing more chicken locally.

Pork was the second largest protein product identified by retailers, consisting of 48,000 individual cuts of meat and 700 kg sourced annually (see table 26). All the retailers said that they source pork year-round (4 out of 4) with three out of four purchasing fresh pork and one who specified purchasing cured pork. All retailers said that they need the pork to be delivered in vacuum sealed packages. When asked about price only one retailer said that they would be willing to pay a premium price for local meat, saying that they would be willing to pay up to 10% more for a local product.

Beef was the third largest protein product mentioned by interviewees who reported sourcing over 10,000 kg and 6,100 individual cuts of meat every year. Of that total 571 kg was estimated to have been sourced locally (see table 26). Retailers all said that they source beef year-round, with most saying that they prefer a fresh product (5 out of 7) and two saying that they have the beef delivered in frozen packages. Beef products were typically delivered in boxes/cases with 3-5 individual packages per case (4 out of 7). When asked about sourcing beef from a local source, five out of the seven retailers said that they would be interested in sourcing local beef with four saying that they would be willing to pay a premium price for a local product (one up to 10% more, one up to 20%, and two 50% or more).

Table 26: Amount of Proteins Sourced by Food Retailers (n=20)

Proteins	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/ Volume
Chicken	143,329	1,633	141,697	Kg
Chicken	52	52	-	Whole
Pork	48,000	-	48,000	Units/Cuts of Meat
Pork	707	-	707	Kg
Beef	10,141	571	9,569	Kg
Beef	6,105	-	6,105	Units/Cuts of Meat
Fish ^a	4,236	3988	248	Kg

^a wild and/or cage raised

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 – The food standard preference mentioned most frequently by retailers was proper food safety certification (18 out of 20 products), followed by high quality meat grades (i.e. grade A or above) (11 out of 20), and animals raised in a certain way (10 out of 20). Specific farming preferences included both pasture-raised (mentioned three times) and grain fed (mentioned twice) and wild over farmed fish (three respondents).

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

Chicken	Pork	Beef	Fish
Whole roasters	Bone in shoulder	Whole animal	Fillets (rainbow trout, pickerel, whitefish)
Chicken breast	Pork loin	(various cuts)	
Chicken thighs	Ham	Prime rib	
	Salami	Top sirloin tip	
		Hamburger	

Delivery Preferences – Nearly all of the retail stores require backdoor delivery from either processors or wholesalers for protein products (19 out of 20 products). This is largely due to the fact that meat products require transportation in refrigerated vehicles. Only two retailers specified that they will travel to a processor to pick up a protein item. In both instances the product that they were picking up was fish and the retail store was located relatively close to the fishery. Delivery frequencies varied across stores with deliveries taking place three times a week (3 out of 20), weekly (3 out of 20), and less than once a week (1 out of 20).

Dairy Products

Food retailers identified milk, cheese, cream, and whipping cream all as primary dairy products, however retailers only provided the yearly quantities for milk, totaling nearly 35,000 liters, all sourced locally (see table 27). All the retailers interviewed source milk year-round and have the milk delivered directly to the store (4 out of 4). Delivery frequencies ranged from once a week (1 out of 4) to several times a week (3 out of 4) with most retailers purchasing bagged milk (3 out of 4) as opposed to milk cartons (1 out of 4). When asked about price, only one retailer indicated that they would be willing to pay more for local dairy (over 50% more) with the remaining retailers saying that the price is comparable for local vs. non-local dairy (3 out of 4). Nearly all of the retailers said that they would be interested in sourcing more local dairy if it were to become available (3 out of 4).

Table 27: Amount of Dairy Sourced by Food Retailers (n=9)

Dairy	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Milk	34,996	34,996	-	Liters
Cheese	-	-	-	Liters
Cream	-	-	-	Liters
Whipping Cream	-	-	-	Liters

Food Standard & Delivery Preferences (All Dairy Summary)

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

Food standard preferences – When asked about their food standard preferences for dairy products, nearly all the retailers interviewed said that having the proper food safety certification was important to them (8 out of 9 products). One interviewee mentioned the necessity of proper transportation for dairy products, noting that food safety was very important to them and that they work to “ensure the safety of their products from the producer to the shelf.”

Delivery preferences – Across all dairy products sourced, retailers expressed a preference for the products to be delivered directly to the store (9 out of 9). This can be attributed to the need

for refrigerated trucks to deliver dairy products in order to prevent spoilage. Delivery frequencies typically ranged from once a week (4 out of 9) to twice a week (5 out of 9). Packaging needs ranged from 500 ml, to 1/3/4-liter bags/cartons for liquid dairy products (i.e. milk, cream, and whipping cream) to 4.5/22/and 31 kg wheels/blocks for cheese products.

Eggs

Retail stores reported sourcing 4,220 dozen local eggs – out of a total 11,290 dozen eggs – every year. All four retailers said that they source eggs year-round and that they purchased small, medium, large, and extra-large white and brown eggs. Large-white eggs were the most common egg type with all four retailers purchasing this type of egg. As these eggs were purchased for resale, retailers preferred purchasing eggs in the standard dozen cartons.

Similar to other products, all retailers expressed a preference for eggs to be delivered directly to the store – with one respondent who said that they will sometimes pick up the eggs from the producer. Deliveries took place twice a week for three out of the four respondents with one respondent expressing a preference for weekly egg deliveries. As with food service representatives, retailers said that they need to have their eggs certified through a recognized food safety program (3 out of 4) and one respondent expressed a preference for free range eggs.

When asked about price, all four said that they would be willing to pay a premium price for local eggs with one saying they'd pay up to 10% more, another up to 20%, and two saying they could pay 50% or higher. All four respondents also said that they would be interested in sourcing more local eggs provided that producers can meet the necessary health and safety requirements.

Grains, Oilseeds and Pulse Crops

Only one of the 23 food retailers spoke to their use of grain products. This retailer said that they purchase 4,800 kg of all-purpose flour a year (or ten 40kg bags/month at \$38 a bag). This respondent spoke to the importance of supporting local, saying that they purchase all of their flour locally but that they couldn't say how much of the wheat is produced local – estimating between 10-15% of the total or 600 kg. Flour products are delivered directly to the store, every two weeks, and are packaged in paper bags. When asked about price this retailer acknowledged that they could purchase flour for less from one of the larger wholesalers but chooses to support local (paying around 10% more).

Other Products

Regarding the procurement of 'other' products, retailers identified maple syrup, tea, and honey as primary food items.

Maple syrup was the largest of these products sourced by retailers who reported sourcing 500 bottles and 72 liters annually – of which 67 liters was sourced locally (see table 28). Of the four interviewees who spoke to this product, all said that they source maple syrup year-round and two said that they would be willing to pay more for local syrup (up to 10% and 20% more respectively), with the remaining two noting that the price is comparable for local syrup. When asked if they would be interested in sourcing more of these products locally all four interviewees said that they would under the right circumstances (i.e. price, quality, and need).

Table 28: Amount of Other Products Sourced by Food Retailers (n=6)

Other Products	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Maple syrup	500	-	500	Bottles
Maple syrup	72	67	5	Liters
Tea	120	120	-	Packages
Honey	113	56.5	56	Liters

Food Standard & Delivery Preferences (All 'Other' Product Summary)

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

Food standard preferences – Consistent quality was important to all retailers, with one noting that they “will not consider products of low or inconsistent quality.” Regarding specific food standard preferences, all interviewees noted that their suppliers have to have all the necessary food safety certifications for their products.

Delivery preferences – Regarding retailer’s delivery preferences for maple syrup, tea, and honey, all said that they prefer to have product delivered directly to the store (6 out of 6 products). Delivery frequencies ranged from once a month for the tea to every 2-6 months for honey and maple syrup products.

3.3.3 Food Processing

Representatives from the food processing industry were also invited to participate in this study. A total of nine food processors from Algoma were interviewed and identified products that they were either currently sourcing locally or had an interest in sourcing locally in the future. The top food categories identified by processors were vegetables, proteins, grains, and others (i.e. hops and maple syrup). 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

Only one processor reported using vegetables as a primary food item in their business. This processor said that they use onions, potatoes, spinach, and squash but didn’t specify the yearly amount that they purchase. When asked to comment on the processed condition and delivery preferences for these products this producer indicated that they procure all four vegetable items year-round and that they require produce to be delivered frozen and semi-processed. When asked about price, this processor said that they would be willing to pay up to 10% more for local produce, however their willingness to switch to a local producer would greatly depend on the producer’s ability to guarantee food safety handling standards and provided the vegetable items in the semi-processed format they require.

Note: This food processor did not discuss food standard or delivery preferences in detail.

Proteins

At 7,900 kg and 520 whole animals purchased per year, beef was the top commodity used by Algoma processors (see table 29). This product was sourced year-round by four processors, who specified a preference for a fresh product (2 out of 4), that was delivered in vacuum sealed

packages (1 out of 4). At the time of the interview, processors said that they purchased 520 whole animals per annum. When asked about willingness to source more local beef, all four said that they would be interested in switching to a local source under the right circumstances, and half said that they would be willing to pay more for a local product.

Table 29: Amount of Proteins Sourced by Food Processors (n=8)

Proteins	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Beef	7,937	-	7,937	Kg
Beef	520	520	-	Whole
Pork	3,628	-	3,628	Kg
Pork	360	335	25	Whole
Pork	320	-	320	Cuts of Meat
Chicken	1,814	-	1,814	Kg
Turkey	1,134	-	1,134	Kg

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 – Food processors identified AAA graded proteins, non-GMO, and organic as their primary food standard preferences. One interviewee noted that they would like to see more consistency in their pork, noting that some producers send them fatter hogs while others send them lean animals. Regarding the types of processed meat purchased by food services, respondents indicated purchasing the following processed proteins:

Beef	Pork	Chicken	Turkey
Whole animal	Whole animal (half carcasses, headless, cold weight)	Whole birds	Boneless, skinless, thighs
Beef loin	Pork loin	Boneless chicken breasts	
	Pork butts		

Delivery preferences – When asked about delivery preferences, the majority of processors said that they prefer direct delivery either from the producer, wholesaler, or other processor (8 out of 8 products). Delivery dates varied based on need with some having their products delivered on a weekly basis while others placed bulk orders a few times a year. Processed conditions upon arrival varied based on need with some processors ordering fresh and unprocessed (6 out of 8), whole animals (3 out of 8), or frozen cuts (1 out of 8).

Grains, Oilseeds and Pulse Crops

Food processors identified barley as the top grain product sourced at 116,400 kg of barley purchased every year. Of this total over 90,700 kg was reported to have been sourced locally (see table 30). These processors were purchasing both barley and hops with deliveries ranging from once a week for one processor to an ‘as needed’ basis for the other. Both processors who reported on barley use indicated that they source this product year-round and one said that they would be willing to pay more for local barley. Furthermore, when asked if they would be interested in sourcing more barley locally one processor said that they are very much interested in increasing their supply as their operation expands, saying that they “*strongly believe in supporting local ... [we] would like to support local barley growers and malt processors.*”

Table 30: Amount of Grains Sourced by Food Processors (n=11)

Grains	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Barley	116,433	90,719	25,714	Kg
Wheat	60,211	13,800	46,411	Kg
Rye Flour	24,120	-	24,120	Kg
Corn Flour	240	120	120	Kg
Hops	236	-	236	Kg

Note: Pea Barley was also identified by processors, however no quantities were given

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 the food standard preferences of processors, nearly all interviewed indicated that they purchase their grains in some sort of pre-processed condition (i.e. malt barley, refined flour, etc.) with only one processor indicating that they purchase whole grain wheat. Processors identified ‘food safety certification’ as the primary food standard requirement (4 out of 11), followed by an organic certification (3 out of 11). In the discussion around organic products, one processor noted a challenge with sourcing their products locally as they currently don’t see enough demand for local wheat to merit the risk of investment for someone to start a local mill; going on to note that since they only buy organic grains that it adds another layer of complexity to the idea of a local mill.

Delivery preferences – Delivery preferences ranged based on storage capacity and need with some processors receiving deliveries once to twice a week (4 out of 11) while others had products delivered once every two months (3 out of 11). All the processors interviewed had their grains delivered directly to them by a processor or wholesaler.

Other Products

Food processors identified hops and maple syrup as primary ‘other’ products that they source – however quantities were only provided for the hops. One food processor reported sourcing 544 kg of hops annually – none of which was sourced locally (see table 31). Both processors reported sourcing these products year-round and that they have their products delivered directly to them by a producer or wholesaler (2 out of 2). Regarding food packaging and standard preferences, processors indicated a preference for the hops to be delivered in a bag and for the maple syrup to be a B-grade product. When asked if they would be interested in sourcing more of these products locally both processors said yes.

Table 31: Amount of Other Products Sourced by Food Processors (n=2)

Other Products	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Hops	544	-	544	Kg
Maple syrup	-	-	-	Liters

3.3.4 Food Programs

A total of 11 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 program interviewees identified carrots, cucumbers, potatoes, lettuce, and squash as the top sourced produce items.

Carrots were sourced in the greatest quantity with over 30,400 kg used on an annual basis (see table 32). Interviewees all said that they are currently sourcing carrots from outside Northern Ontario, however they would be interested in sourcing carrots locally if they were to become available. When asked about price, both said that they would be willing to pay more for local carrots (1-10% and 10-15% more respectively). Respondents were split in their usage of this product, with one saying that they source carrots year-round in small amounts while the other said that they use carrots seasonally and need them to come in washed and pre-cut. Both interviewees said that they source carrots as needed by their programs. They also highlighted the importance of the producers being certified through a recognized food safety program for them to consider sourcing products from them.

Cucumbers were the second largest vegetable product identified by food programs, with respondents reporting over 24,400 kg of cucumbers sourced annually (with a mere 14 kg sourced locally) (see table 32). As with the carrots, these quantities were split between two food programs. Both programs reported using cucumbers seasonally and that they typically have them delivered once and twice a week respectively. The programs also require a product that's pre-washed with one saying that they need to have the cucumbers semi-processed (i.e. washed and cut). When asked about price, one of the programs said that they would be willing to pay up to 15% more while the other indicated that the cost would have to be the same or cheaper for them to consider switching producers. One of the respondents confirmed that proper certification is important.

Potatoes were the third largest vegetable product used by food programs, comprising of nearly 6,000 kg sourced annually – 5,800 of which was sourced locally (see table 32). Food programs were divided regarding when they typically source potatoes with half of them saying that they use potatoes seasonally (2 out of 4) and half saying that they source potatoes year-round (2 out of 4). Interviewees typically wanted a product that is fresh and unprocessed with only one respondent saying that they need the potatoes to be semi-processed. Packaging requirements for potatoes varied based on need with respondents saying that they are typically packaged in bags or boxes with weights that range between 22.5 – 45 kg per package. When asked about price, all but one (3 out of 4) said that they would be unable to pay a premium price, however there was interest in sourcing more local potatoes with three out of four saying that they would be interesting in buying more locally and one saying that they would be interested under the right conditions.

Lettuce was the fourth largest vegetable product discussed by food program representatives with respondents reporting over 2,200 kg of lettuce annually with nearly all of the lettuce

sourced locally (see table 32). This quantity was split between two food programs in Algoma with varying price and delivery needs. Both programs require a product that is fresh and pre-washed, packaged in a box or a crate. Interviewees reported sourcing lettuce both seasonally and year-round and said that they have it delivered both several times a week and once a week respectively. When asked about price, one respondent said that they would be willing to pay up to 10% more for a local product while the other said that the price would have to be the same.

The fifth largest vegetable product identified by respondents was squash with a reported 2,700 kg sourced annually – all of which was sourced locally by one food program (see table 33). This program uses squash seasonally with squash coming in several times a week. When asked about delivery and packaging preferences the interviewee said that they prefer a fresh product delivered to them by either the producer or a wholesaler. When asked about price they said that they are unable to pay extra but would be interested in sourcing more local squash under the right conditions.

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

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced from Elsewhere	Volume/Weight
Carrots	30,492	-	30,492	Kg
Cucumbers	26,409	14	26,395	Kg
Potatoes	5,964	5,809	155	Kg
Lettuce	2,232	2,157.17	75	Kg
Squash	2,177	2,177	-	Kg
Beans	2,041	2,041	-	Kg
Squash	640	640	-	Individual
Onions	94	-	94	Kg
Other	83	-	83	Kg
Cabbage	18	16	2	Kg
Corn	4	4	-	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 – Food programs were split with their food standard requirements with food banks being less particular about their food standard preferences than other industry representatives. Many of the interviewees noted that they have limited capacity to receive perishable products (such as meat, dairy, eggs or produce). The ones who did receive perishable products spoke to how grateful they were to be receiving these donations – noting the challenge that they face in providing fresh and healthy foods to their clients. All of the interviewees who received perishable produce items said that the products have to be in good condition and safe to eat. Having the proper food safety certification was mentioned most frequently (7 out of 16), followed by highly graded products (2 out of 16) and fresh/unblemished products (1 out of 16).

Delivery preferences – Food program representatives indicated a preference for vegetable products to be delivered directly to them either by the producer (11 out of 16 products) or by a wholesaler (6 out of 16). As many of the food programs included in this study are food banks, there was also a number respondents who discussed deliveries from individuals and/or picking up food items from larger foodbank warehouses (11 out of 16 datapoints). Procurement activity across all vegetable types was split between year-round (9 out of 16) and seasonal (9 out of 16)

procurement activity, with delivery frequencies also ranging most often from once a week (7 out of 16) and several times a week (9 out of 16).

Fruits and Berries

Regarding the procurement of local fruits and berries, apples were the largest fruit product identified by food program respondents who reported sourcing over 65,000 kg annually (see table 33). Interviewees sourced apples year-round (2 out of 3) or seasonally (1 out of 3) based on availability and need. All three food program representatives said that they would be willing to pay more for local apples under the right conditions – with price flexibility ranging from 1-10% more (1 out of 3) to 11-20% more (2 out of 3). Out of the three programs interviewed, two specified a need for apples that are washed and semi-processed (i.e. apple slices), packaged in individual bags and shipped in a box. These specific program needs meant that they were sourcing their products from a food processor (rather than a wholesaler or producer) and had the apples shipped through them accordingly. When asked if they would be interested in sourcing more locally produced apples, all three program respondents said ‘yes.’

Table 33: Amount of Fruit Sourced by Food Programs (n=8)

Fruit	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/Volume
Apples	65,032	-	65,032	Kg
Watermelon	20	-	20	Individual
Blueberry	11	11	-	Kg
Strawberry	11	11	-	Kg

Food Standard & Delivery Preferences (All Fruit Summary)

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

Food standard preferences – Food program respondents identified unblemished/regular shaped foods as the primary food standard consideration (7 out of 8) followed by foods that have the proper health and safety certification (2 out of 8). Receiving quality products was a high concern for interviewees – particularly because it is a perishable product – however not all respondents thought that fruit items had to be of a specific quality. One respondent noted that as long as the food is safe/healthy it doesn’t matter if it all looks the same and continued on to say that, in their program, they use irregularly shaped produce items as a teachable moment for their clients and an opportunity to discuss the variations that take place in nature.

Delivery preferences – Delivery needs varied across interviews based on the type of program. For many of the food programs, items were either donated from individuals in the community or they were donated and/or purchased from local grocery stores (6 out of 8). Several food programs also took their clients berry picking in the summer months, in which case no direct delivery to their location was necessary. In one instance, the program hired a third-party carrier to pick up and deliver products purchased from various producers and/or wholesalers. Delivery frequencies also varied greatly with food bank respondents noting inconsistent donation practices where they may only get certain products donated a few times a year. Other food programs however noted more frequent delivery (i.e. once or twice a week) to suit their procurement needs (3 out of 8).

Proteins

The top protein item procured by food programs was a variation of ground meat used by a soup kitchen, who estimated using over 4,300 kg of ground meat in their soups and stews every year (see table 34). This program sourced various types of ground meat year-round and estimated that 1,500 of the meat items that they purchased came from a local source. As a non-profit, this program was limited in purchasing whichever meat items were on sale and/or cheapest at the time of purchase and therefore didn't have flexibility in their budget to pay a premium price for a local product. Meat products were purchased either fresh or frozen and packaged in vacuum sealed bags. Meat orders were also placed on an 'as needed' basis with food wholesalers typically delivering the meat to their location.

Chicken was the second largest protein product sourced by food programs in Algoma, consisting of over annual 400 kg (see table 34). Two programs identified chicken as a primary meat item with one program specifying that they normally purchase chicken thighs. When asked about the processed condition of the chicken both said that they purchase approximately 1kg packages, with one said that they prefer a fresh product while the other expressed a preference for frozen. Both purchase their chicken from a local grocery store with purchasing frequencies varying from several times a week to twice a month. Although they both purchased their chicken from a local retailer none of the chicken was produced locally. When asked about price, one of the interviewees said that they would be willing to pay up to 10% more for a locally produced item while the other said that the price would have to be competitive. Both interviewees said that they would be interested in sourcing local chicken under the right circumstances.

Wild game, specifically moose, was the third largest protein product sourced by food programs at 340 kg sourced annually (see table 34). Unlike other protein products, wild game is obtained through seasonal hunts and so the quantity and type of game can vary from year-to-year. One food program in Algoma identified wild meat as a primary meat item, saying that the meat is donated by members in the community after a hunt. When asked about delivery the interviewee said that wild meat gets sent off to be processed by a local processor first, where it's processed into a variety of different cuts and packaged in vacuum sealed bags, before it gets picked up. As the meat is all donated, they do not currently pay extra for local meat. When asked if they would be interested in sourcing more local meat they said yes.

Table 34: Amount of Proteins Sourced by Food Programs (n=5)

Proteins	Total annual amount used	Amount sourced locally	Amount sourced elsewhere	Weight/ Volume
Other ^a	4,353.74	1,523.80	2829.93	Kg
Chicken	408.16	-	408.16	Kg
Wild Game ^b	340.14	340.14	-	
Fish ^c	226.76	226.76	-	Kg
Beef	108.84	-	108.84	Kg

^a ground meat (i.e. chicken, beef, turkey)

^b moose

^c wild and/or cage raised

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 identified food safety certification as the primary food standard preference for their programs (5 out of 5 products), followed by proteins graded A or above (5 out of 5).

Delivery preferences – Several food program interviewees expressed an explicit preference for protein items to be delivered directly to them (3 out of 5). Given that some food items are donated there is a greater willingness to pick up products from the source (2 out of 5). Few food program representatives expressed specific delivery frequencies, saying rather that they purchase food products as needed.

Dairy Products

Milk was the only dairy product identified by food programs, who reported sourcing 4,298 liters annually – of which 4,215 liters were locally sourced. Food programs typically purchased bagged milk (3 out of 4) in 3- or 4-liter quantities. All the interviewees said that they source milk year-round, with deliveries typically taking place once a week (4 out of 4). Unlike some of the other groups, food programs were more likely to pick up their milk from the local grocery store, with only one interviewee indicating that they had their milk delivered to them. Nearly all of the interviewees also noted the importance of food safety certification for dairy products (3 out of 4) as their primary food standard requirement.

When asked about price, all interviewees said that they would be unable to pay more for local milk (with a couple noting that there is no price difference between local and non-local dairy), however three out of the four interviewees said that they would be interested in sourcing more local dairy should it become available.

Use of Eggs

Food programs reported sourcing a total of 1,530 dozen eggs per year – of which 624 dozen eggs were sourced locally. All the interviewees said that they source eggs year-round (5 out of 5) and expressed a preference for large or extra-large eggs (5 out of 5). Most of the interviewees said that they typically purchase white eggs (4 out of 5) however two said that they will also buy brown eggs. Eggs were typically purchased in dozen cartons (4 out of 5) however one food program purchased larger quantities of eggs in 15 dozen crates. As with the other sectors, food program interviewees mentioned the importance of proper food safety certifications as a primary food standard requirement (3 out of 5).

All but one food program said that the eggs are either donated or are purchased from the grocery store – therefore only one program required that their eggs be delivered. Delivery frequencies varied greatly based on the needs of the program with two programs purchasing eggs weekly, while the other programs purchase eggs every three weeks, once a month, and four times a year, respectively.

When asked about price, only one interviewee said that they would be willing to pay a premium price for local eggs – specifying their willingness to pay up to 10% more for a local product – whereas the rest said that the price would have to be comparable. That being said, four out of the five respondents said that they would be interested in sourcing local eggs should they become available.

Grains, Oilseeds and Pulse Crops

Regarding the procurement of local grains, two food programs identified wheat products as a regularly purchased item – sourcing a combined total of 2,760 loaves of bread every year. Although one of the respondents indicated that they purchase their bread from a local bakery, neither knew if the wheat was produced or processed locally. Only one respondent spoke to their delivery needs, stating that they have bread delivered once a week by a wholesaler. When asked about price, this respondent said that the cost would have to be comparable for them to consider switching to a local producer. When asked about food standard preferences, having the proper food safety certification was identified as a primary requirement.

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

A food producer focus group was conducted in Bruce Station where Algoma based producers 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.

The producers 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

- Some buyers (e.g. retailers and restaurants) want low pricing and are resistant to pay a premium price for a high-quality local product.
- Some buyers are accustomed to the food pricing offered through major food distributors (e.g. price discounts offered on volume) and they look for / expect these same deals from local producers (underpricing).

Seasonality and product availability

- The growing season is short in the region which results in limited availability of some food items through the year (e.g. fresh produce).
- Some producers are small scale operations and cannot respond to the large volumes required by major distributors/grocery stores.
- There can be production surges (associated with the short season) that result in market saturation (i.e. not enough buyers for all of the local product).

Difficulties with buyer practices / attitudes

- Some buyers don't want to adjust their established purchasing structure/process to accommodate the seasonal produce.
- Retailers and restaurants often place irregular / short notice orders which makes it difficult to deliver to their needs.
- Some buyers have limited commitment to local producers (i.e. they don't commit to buying from local producers on an ongoing basis and/or don't recommit to supporting local growers with each harvest season).
- Producers have tried to reach out to retail stores and restaurants and provide personalized service (price matching, matching ordering day, matching their delivery day), but they still receive inconsistent orders and have to deal with inconsistent demands. It is difficult to break the established routines of retailers and restaurants especially when major wholesalers can offer the convenience of one stop shopping and volume purchasing discounts.

Logistics of delivery

- Producers don't have the resources / capacity to respond to all requests – especially small order requests in remote/distant communities (e.g. a minimum \$ order is required to make delivery worthwhile to the more remote areas).
- Some local fresh products have a very short shelf life (e.g. strawberries, oyster mushrooms) and purchaser delivery requirements are not set up to take full advantage of this.

Product specifications

- Some retailers and restaurants have very detailed product specifications that need to be met (e.g. certification, value-added processing, packaging units, delivery scheduling, etc.)... and they often choose the convenience of ordering through the major food wholesalers to get the items they want. Local producers typically don't have the resources / capacity to address all of these details.

Inauthentic retail / restaurant practices

- Some retailers/ restaurants may feature a local product on their shelf / menu for a period of time and then continue to use this marketing angle even though they have switched to non-local options.

Algoma based producers also discussed some of the factors that are limiting their ability to expand their operations. A common challenge identified is the need for greater infrastructure capacity to further facilitate the movement of local products into the food system. It was noted that livestock producers are hesitant to ramp up production unless meat processing capacity can be assured. It was also suggested that the region needs a Good Agricultural Practices (GAP) certified facility for handling local fresh produce... to enable local producers to bring their harvest in and make use of the processing / packing / storing operations. At least one producer emphasized that the job of farm production is in itself a huge time commitment which means producers have little time to focus on developing their sales. Another producer noted that their season for fresh produce could potentially be expanded with the proper facilities but this would require an investment to construct the necessary buildings. Several producers also noted that they continue to face issues with finding reliable labour.

Algoma 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).

- Establish a local Good Agricultural Practices (GAP) certified facility for handling / processing local fresh produce.
- Examine opportunities for co-marketing and co-transporting/delivery of local food products.
- Establish a cohesive 'locally grown brand' for Algoma producers, food retailers and restaurants to utilize in their promotions / marketing campaigns.
- Further expand the marketing and promotion of locally grown on social media platforms.
- Promote opportunities for retailers / restaurants and producers to network and reinforce the importance of trying to forecast / estimate their food demand to better enable producers to plan their production activities.
- Secure stable / viable locations for farmer's markets and ensure that regulations are consistent across communities and followed (e.g. food certification/ grading standards)
- In times of overstock production ensure that surplus vegetables and fruit is processed to reduce waste and extend the season.

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 Algoma 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 were not surprised to see the wide-ranging responses from businesses / organizations in terms of the way they identify with the term ‘locally grown’. About 36% of the businesses / organizations interviewed identified locally grown as food items that are produced harvested in Algoma District while a further 25% identified locally grown as coming from northern Ontario and 39% held a broader definition that identified all of Ontario and/or Canada as locally grown. It was suggested that some businesses likely view the term ‘locally grown’ from two perspectives – a business perspective where a broader definition is used (e.g. Ontario) and a regionality perspective where a narrower definition is used (e.g. community). Indeed, some of the businesses that were interviewed expressed their views in that manner where they initially identified the community/surrounding region as local but emphasized the importance/need for a broader definition from a business standpoint.

Producers anticipated that the high quality and freshness of Algoma grown food items and the value of using ‘locally 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 (63%) with the high quality of locally grown foods ranking as the second most common factor (40%).

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 (43%). Producers also recognized the other key concerns brought forward by businesses / organizations including the insufficient volume of production (33%) as well as issues related to seasonality / inconsistent availability (21%).

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.



4.0 Conclusions & Recommendations

Conclusions

Agricultural production in Algoma 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 a diversity of field crop production (e.g. grains, oilseeds, potatoes, vegetables), greenhouse vegetable production, tree fruit production (e.g. apples, pears), and berry production (e.g. strawberries, raspberries) 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.

The flow (i.e. marketing) of locally grown food through local businesses and organizations in Algoma 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 and wineries)
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 (60%+) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group almost half feel that 'locally grown' refers to food produced specifically in Algoma 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.

Algoma 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 the businesses / organizations (60%+) 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 Algoma 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 Algoma 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 Algoma 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.³¹

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *	Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Sweet corn	over 100,000 cobs	Beef – hamburger	over 14,000 kgs
Carrots	over 32,000 kgs	Beef – various cuts	over 23,000 kgs
Cucumbers	over 26,000 kgs	Pork – various cuts	over 50,000 kgs
Tomatoes	over 5,000 kgs	Pork – bacon	over 1,700 kgs
Cabbage	over 6,400 kgs	Pork – ground/sausage	over 2,500 kgs
Onions	over 4,700 kgs	Turkey – whole & cuts	over 4,000 kgs
Cauliflower	over 4,200 kgs	Chicken – various cuts	over 8,300 kgs
Potatoes	over 8,300 kgs	Eggs, whole shell	over 18,000 dozen
Lettuce	over 3,500 kgs	Fresh water fish	over 6,000 kgs
Apples	over 65,000 kgs	Milk, fluid	over 10,000 litres
Strawberries	over 2,200 kgs	Cheese	over 600 kgs
Wheat flour	over 43,000 kgs	Maple syrup	over 500 bottles
Rye flour	over 25,000 kgs		
Oats – rolled	over 500 kgs		
Malt barley	over 25,000 kgs		
Malt wheat	over 6,500 kgs		
Hops	over 700 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

³¹ 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.

expectations that local businesses have are not very realistic when measured against the deep discounts that large volume food wholesalers/distributors can offer.

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.

Producers also acknowledge that they face challenges in meeting the delivery needs of buyers. It was emphasized that filling small volume orders for distant/isolated locations is not cost effective.

The other 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 fresh produce.

Other opportunities that producers feel need to be explored include:

- Examine co-marketing and co-transporting / delivery opportunities of local food products.
- Establish a cohesive 'locally grown' brand for Algoma to utilize in marketing campaigns.
- Further expand the marketing and promotion of locally grown on social media platforms.
- Promote opportunities for retailers / restaurants and producers to network.
- Secure stable / viable locations for farmer's markets and ensure that regulations are consistent across communities and followed (e.g. food certification/ grading standards)

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of Algoma 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.³²
 - 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).³³

³² 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 "Algoma District" can result in an incomplete list -- specific communities in the District need to be searched to extract a more complete list from the directory.

³³ 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:

- 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).³⁴

Algoma Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for Algoma to utilize in food marketing campaigns.
 - 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).

<http://www.inspection.gc.ca/food/archived-food-guidance/safe-food-production-systems/food-safety-enhancement-program/recognition-program/eng/1299860970026/1299861042890>

³⁴ 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/>

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

- ☐ Algoma District
- ☐ Manitoulin District
- ☐ Sudbury District
- ☐ Nipissing District
- ☐ Northern Ontario
- ☐ Ontario
- ☐ Canada
- ☐ I'm not totally sure what local food means
- ☐ Other, specify: _____

Distance

- ☐ Within a 25 km radius or less
- ☐ Within a 26 to 50 km radius
- ☐ Within a 51 to 75 km radius
- ☐ Within a 76 to 100 km radius
- ☐ Within a 101 to 200 km radius
- ☐ Within a 201 to 300 km radius
- ☐ Within a 301 to 400 km radius
- ☐ More than 400 km radius

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 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 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 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 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 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 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 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 Algoma District by Select NAICS Classification

Food / beverage manufacturing establishments in Algoma 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	1	0	0	0	0	0	0	0	0	1
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	0	0	0	0	0	0	0	0	0	0
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	1	0	0	0	0	0	0	1
31161	Animal slaughtering and processing	0	0	1	0	0	0	0	0	1	2
31171	Seafood product preparation and packaging	0	1	0	0	0	0	0	0	1	2
31181	Bread and bakery product manufacturing	1	1	0	1	0	0	0	0	2	5
31182	Cookie, cracker and pasta manufacturing	0	0	0	0	0	0	0	0	1	1
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	1	1
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	1	0	0	0	0	0	0	1
3121	Beverage manufacturing	1	1	1	0	0	0	0	0	2	5
Total number of businesses		3	3	4	1	0	0	0	0	8	19

Source: Statistics Canada, 2018

Food retail establishments in Algoma 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	3	4	2	4	5	4	1	0	6	29
44512	Convenience stores	4	11	13	1	0	0	0	0	13	42
44521	Meat markets	3	3	1	1	0	0	0	0	0	8
44522	Fish and seafood markets	0	0	0	0	0	0	0	0	0	0
44523	Fruit and vegetable markets	1	0	0	0	0	0	0	0	0	1
44529	Other specialty food stores	4	3	1	2	0	0	0	0	8	18
44531	Beer, wine and liquor stores	11	6	10	0	0	0	0	0	1	28
Total number of businesses		26	27	27	8	5	4	1	0	28	126

Source: Statistics Canada, 2018

Food wholesale establishments in Algoma 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	2	2
41312	Dairy and milk products merchant wholesalers	1	0	0	0	0	0	0	0	0	1
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	2	2
41319	Other specialty-line food merchant wholesalers	2	0	1	1	0	0	0	0	4	8
41321	Non-alcoholic beverage merchant wholesalers	0	0	1	0	0	0	0	0	1	2
41322	Alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
Total number of businesses		3	0	2	1	0	0	0	0	9	15

Source: Statistics Canada, 2018

Food service establishments in Algoma 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	2	2	5	1	0	0	0	0	1	11
72232	Caterers	2	1	1	0	2	0	0	0	7	13
72233	Mobile food services	0	0	0	0	0	0	0	0	6	6
72241	Drinking places (alcoholic beverages)	3	3	2	1	0	0	0	0	8	17
72251	Full-service restaurants and limited-service eating places	24	30	49	34	10	3	0	0	48	198
Total number of businesses		31	36	57	36	12	3	0	0	70	245

Source: Statistics Canada, 2018

Accommodation establishments in Algoma 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	14	7	12	8	1	3	1	0	29	75
72119	Other traveller accommodation	6	3	0	0	0	0	0	0	12	21
72131	Rooming and boarding houses	0	0	0	0	0	0	0	0	0	0
Total number of businesses		20	10	12	8	1	3	1	0	41	96

Source: Statistics Canada, 2018

Community food services in Algoma 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	1	1

Source: Statistics Canada, 2018

Appendix C: Agriculture Production in Algoma District

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	335	317	280	-16.4	-11.7
Total farm area: Under 10 acres	18	12	14	-22.2	16.7
Total farm area: 10 to 69 acres	51	56	46	-9.8	-17.9
Total farm area: 70 to 129 acres	56	67	56	0.0	-16.4
Total farm area: 130 to 179 acres	43	30	29	-32.6	-3.3
Total farm area: 180 to 239 acres	29	39	31	6.9	-20.5
Total farm area: 240 to 399 acres	59	51	43	-27.1	-15.7
Total farm area: 400 to 559 acres	34	24	23	-32.4	-4.2
Total farm area: 560 to 759 acres	14	16	19	35.7	18.8
Total farm area: 760 to 1,119 acres	21	14	14	-33.3	0.0
Total farm area: 1,120 to 1,599 acres	8	7	4	-50.0	-42.9
Total farm area: 1,600 to 2,239 acres	1	1	-	-100.0	-100.0
Total farm area: 2,240 to 2,879 acres	1	-	1	0.0	-
Total farm area: 2,880 to 3,519 acres	-	-	-	-	-
Total farm area: 3,520 acres and over	-	-	-	-	-
- Nil or zero					

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

Gross Farm Receipts for Algoma 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 \$	\$20,095,138	\$13,371,136	\$16,400,974	-18.4	22.7
Under \$10,000 - Farms reporting	131	140	99	-24.4	-29.3
\$10,000 to \$24,999 - Farms reporting	90	77	60	-33.3	-22.1
\$25,000 to \$49,999 - Farms reporting	46	47	46	0.0	-2.1
\$50,000 to \$99,999 - Farms reporting	33	30	33	0.0	10.0
\$100,000 to \$249,999 - Farms reporting	21	14	30	42.9	114.3
\$250,000 to \$499,999 - Farms reporting	9	4	7	-22.2	75.0
\$500,000 to \$999,999 - Farms reporting	3	4	4	33.3	0.0
\$1,000,000 to \$1,999,999 - Farms reporting	1	1	1	0.0	0.0
\$2,000,000 and over - Farms reporting	1	-	-	-100.0	-
- Nil or zero					

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	335	317	280	-16.4	-11.7
Beef cattle ranching and farming, including feedlots	85	9	5	-47.1	-8.2
Dairy cattle and milk production	12	8	9	-25.0	12.5
Hog and pig farming	1	2	-	-100.0	-100.0
Poultry and egg production	4	3	2	-50.0	-33.3
<i>Chicken egg production</i>	3	1	2	-33.3	100.0
<i>Broiler and other meat-type chicken production</i>	-	-	-	-	-
<i>Turkey production</i>	1	1	-	-100.0	-100.0
<i>Poultry hatcheries</i>	-	-	-	-	-
<i>Combination poultry and egg production</i>	-	-	-	-	-
<i>All other poultry production</i>	-	1	-	-	-100.0
Sheep and goat farming	4	1	6	50.0	500.0
<i>Sheep farming</i>	3	-	5	66.7	-
<i>Goat farming</i>	1	1	1	0.0	0.0
Other animal production	69	60	49	-29.0	-18.3
<i>Apiculture</i>	5	2	3	-40.0	50.0
<i>Horse and other equine production</i>	22	23	15	-31.8	-34.8
<i>Fur-bearing animal and rabbit production</i>	-	-	-	-	-
<i>Animal combination farming</i>	35	31	27	-22.9	-12.9
<i>All other miscellaneous animal production</i>	7	4	4	-42.9	0.0
Oilseed and grain farming	2	2	5	150.0	150.0
<i>Soybean farming</i>	1	-	2	100.0	-
<i>Oilseed (except soybean) farming</i>	-	-	1	-	-
<i>Dry pea and bean farming</i>	-	-	-	-	-
<i>Wheat farming</i>	-	1	-	-	-100.0
<i>Corn farming</i>	-	-	-	-	-
<i>Other grain farming</i>	1	1	2	100.0	100.0
Vegetable and melon farming	10	15	14	40.0	-6.7
<i>Potato farming</i>	2	4	1	-50.0	-75.0
<i>Other vegetable (except potato) and melon farming</i>	8	11	13	62.5	18.2
Fruit and tree nut farming	7	9	12	71.4	33.3
Greenhouse, nursery and floriculture production	22	18	18	-18.2	0.0
<i>Mushroom production</i>	-	-	4	-	-
<i>Other food crops grown under cover</i>	-	-	1	-	-
<i>Nursery and tree production</i>	12	8	7	-41.7	-12.5
<i>Floriculture production</i>	10	10	6	-40.0	-40.0
Other crop farming	119	150	120	0.8	-20.0
<i>Hay farming</i>	80	82	75	-6.3	-8.5
<i>Fruit and vegetable combination farming</i>	5	3	2	-60.0	-33.3
<i>Maple syrup and products production</i>	..	32	26	-	-18.8
<i>All other miscellaneous crop farming</i>	34	33	17	-50.0	-48.5
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 Algoma District by Acreage – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area - Farms reporting	335	317	280	-16.42	-11.67
Total farm area - Acres	95,814	81,005	74,307	-22.45	-8.27
Area owned - Acres	69,515	63,233	57,655	-17.06	-8.82
Area leased from governments - Acres	784	319	x	-	-
Area rented or leased from others - Acres	23,050	16,382	14,429	-37.40	-11.92
Area crop-shared from others - Acres	742	493	145	-80.46	-70.59
Other areas used by the operation - Acres	3,210	3,866	x	-	-
Area of land used by others - Acres	1,487	3,288	1,287	-13.45	-60.86
- Nil or zero					
x Data suppressed due to confidentiality restrictions					

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total land in crops – acres	38,292	32,390	29,423	-23.2	-9.2
Total pastureland – acres	22,157	18,031	14,904	-32.7	-17.3
Woodland, wetland and other land – acres	35,365	30,584	29,980	-15.2	-2.0
Total farm area – acres	95,814	81,005	74,307	-22.4	-8.3
<i>Percent land in crops/pasture</i>	63.1%	62.2%	59.7%		
<i>Percent land in woodland, wetland, other use</i>	36.9%	37.8%	40.3%		

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area - Farms reporting	335	317	280	-16.42	-11.67
Total farm area - Acres	95,814	81,005	74,307	-22.45	-8.27
Total land in crops - Farms reporting	266	253	226	-15.0	-10.7
Total land in crops - Acres	38,292	32,390	29,423	-23.2	-9.2
Spring wheat (excluding durum) - Acres	143	x	x	-	-
Winter wheat - Acres	105	x	x	-	-
Oats - Acres	1,341	1,014	1,593	18.8	57.1
Barley - Acres	1,008	x	542	-46.2	-
Mixed grains - Acres	1,086	945	770	-29.1	-18.5
Corn for grain - Acres	51	135	44	-13.7	-67.4
Corn for silage - Acres	383	641	681	77.8	6.2
Rye (fall and spring) - Acres	27	x	104	285.2	-
Canola (rapeseed) - Acres	x	x	x	-	-
Soybeans - Acres	x	x	x	-	-
Flaxseed - Acres	-	-	-	-	-
Dry field peas - Acres	x	47	x	-	-
Dry white beans - Acres	-	-	x	-	-
Other dry beans - Acres	x	x	-	-	-
Alfalfa and alfalfa mixtures - Acres	5,268	4,331	4,764	-9.6	10.0
All other tame hay and fodder crops - Acres	26,767	23,479	19,436	-27.4	-17.2
Forage seed for seed - Acres	640	x	24	-96.3	-
Potatoes - Acres	x	205	25	-	-87.8
Sunflowers - Acres	-	x	8	-	-
Buckwheat - Acres	24	46	x	-	-
Sugar beets - Acres	-	x	-	-	-
Other field crops - Acres	1,095	x	x	-	-
- Nil or zero					
x Data suppressed due to confidentiality restrictions					

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total vegetables - Farms reporting	39	49	49	25.6	0.0
Total vegetables - Acres	91	196	153	68.1	-21.9
Sweet corn - Acres	44	96	37	-15.9	-61.5
Tomatoes - Acres	4	5	7	75.0	40.0
Cucumbers - Acres	5	6	7	40.0	16.7
Green peas - Acres	5	4	7	40.0	75.0
Green and wax beans - Acres	3	7	10	233.3	42.9
Cabbage - Acres	2	19	17	750.0	-10.5
Chinese cabbage - Acres	-	3	1	-	-66.7
Cauliflower - Acres	1	3	5	400.0	66.7
Broccoli - Acres	1	5	5	400.0	0.0
Brussels sprouts - Acres	x	x	1	-	-
Carrots - Acres	3	4	5	66.7	25.0
Rutabagas and turnips - Acres	2	2	2	0.0	0.0
Beets - Acres	2	4	4	100.0	0.0
Radishes - Acres	x	1	1	-	0.0
Shallots and green onions - Acres	2	2	2	0.0	0.0
Dry onions, yellow, Spanish, cooking, etc. - Acres	2	2	5	150.0	150.0
Celery - Acres	-	x	1	-	-
Lettuce - Acres	1	2	5	400.0	150.0
Spinach - Acres	-	1	2	-	100.0
Peppers - Acres	1	1	3	200.0	200.0
Pumpkins - Acres	5	9	8	60.0	-11.1
Squash and zucchini - Acres	3	5	7	133.3	40.0
Asparagus, producing - Acres	x	x	1	-	-
Other vegetables - Acres	5	13	12	140.0	-7.7
- Nil or zero x Data suppressed due to confidentiality restrictions					

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total fruits, berries and nuts - Farms reporting	19	29	27	42.1	-6.9
Total fruits, berries and nuts (producing and non-producing) - Acres	51	81	x	-	-
Apples total area - Acres	x	22	x	-	-
Pears total area - Acres	-	x	x	-	-
Plums and prunes total area - Acres	-	x	-	-	-
Cherries (sweet) total area - Acres	x	x	x	-	-
Cherries (sour) total area - Acres	x	1	x	-	-
Grapes total area - Acres	-	-	x	-	-
Strawberries total area - Acres	38	40	45	18.4	12.5
Raspberries total area - Acres	6	x	6	0.0	-
Cranberries total area - Acres	x	x	-	-	-
Blueberries total area - Acres	x	x	x	-	-
Saskatoon berries total area - Acres	-	-	x	-	-
Other fruits, berries and nuts total area - Acres	-	2	6	-	200.0
- 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 Algoma District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total area of greenhouses in use - Farms reporting	14	16	12	-14.3	-25.0
Total area of greenhouses in use - Square feet	401,684	203,949	130,985	-67.4	-35.8
Greenhouse flowers - Farms reporting	11	15	8	-27.3	-46.7
Greenhouse flowers - Square feet	125,784	145,585	87,337	-30.6	-40.0
Greenhouse vegetables - Farms reporting	6	6	5	-16.7	-16.7
Greenhouse vegetables - Square feet	x	x	13,700	-	-
Other greenhouse products - Farms reporting	3	3	6	100.0	100.0
Other greenhouse products - Square feet	x	x	29,948	-	-
Total area under glass, plastic or other protection - Farms reporting	14	16	12	-14.3	-25.0
Total area under glass, plastic or other protection - Square feet	402,984	204,444	149,701	-62.9	-26.8
Total growing area for mushrooms - Farms reporting	-	-	4	-	-
Total growing area for mushrooms - Square feet	-	-	x	-	-
Taps on maple trees in the spring of the census year - Farms reporting	49	65	74	51.0	13.8
Taps on maple trees in the spring of the census year – Number of taps	87,139	137,046	149,985	72.1	9.4
Honeybees - Farms reporting	12	10	15	25.0	50.0
Honeybees - Number of colonies	77	71	67	-13.0	-5.6
- Nil or zero x Data suppressed due to confidentiality restrictions					

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

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

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total cattle and calves - Number	11,119	8,803	8,044	-27.7	-8.6
Calves, under 1 year - Number	3,305	2,535	2,315	-30.0	-8.7
Steers, 1 year and over - Number	1,196	1,000	756	-36.8	-24.4
Total heifers, 1 year and over - Number	1,606	1,587	1,216	-24.3	-23.4
Heifers for slaughter or feeding - Number	757	804	378	-50.1	-53.0
Heifers for beef herd replacement - Number	514	453	479	-6.8	5.7
Heifers for dairy herd replacement - Number	335	330	359	7.2	8.8
Total cows - Number	4,852	3,529	3,582	-26.2	1.5
Beef cows - Number	3,983	2,784	2,844	-28.6	2.2
Dairy cows - Number	869	745	738	-15.1	-0.9
Bulls, 1 year and over - Number	160	152	175	9.4	15.1
Total sheep and lambs - Number	2,424	1,491	1,644	-32.2	10.3
Rams - Number	42	38	38	-9.5	0.0
Ewes - Number	1,083	846	773	-28.6	-8.6
Lambs - Number	1,299	607	833	-35.9	37.2
Total pigs - Number	x	561	220	-	-60.8
Boars - Number	10	13	x	-	-
Sows and gilts for breeding - Number	72	67	x	-	-
Nursing pigs - Number	134	102	119	-11.2	16.7
Weaner pigs - Number	..	96	41	-	-57.3
Grower and finishing pigs – Number *	x	283	12	-	-95.8
Goats - Number	215	329	340	58.1	3.3
Rabbits - Number	..	180	206	-	14.4
Bison (buffalo) - Number	x	x	x	-	-
Elk - Number	x	x	-	-	-
Deer (excluding wild deer) - Number	-	-	-	-	-
Total hens and chickens - Number	29,540	5,524	3,657	-87.6	-33.8
Pullets under 19 weeks, intended for laying - Number	299	668	392	31.1	-41.3
Laying hens, 19 weeks and over - Number	28,490	2,702	2,302	-91.9	-14.8
Layer and broiler breeders (pullets and hens) - Number	..	-	83	-	-
Broilers, roasters and Cornish - Number	751	2,154	880	17.2	-59.1
Turkeys - Number	388	339	113	-70.9	-66.7
Other poultry - Number	286	391	282	-1.4	-27.9
.. 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 Algoma District – 2007, 2011, 2016

	2007	2011	2016	% Change 2007 to 2016	% Change 2011 to 2016
Volume of milk production (kilolitres)	5,773	5,088	5,044	-12.6	-0.9

Source: Dairy Farmers of Ontario.

Table Egg Production in Algoma 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	..	34,157	44,816	-	31.2
.. Figures not available - Nil or zero					

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

Farm Operators in Algoma District – 2006, 2011, 2016

	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farm operators	480	480	420	-12.5	-12.5
Gender: Male - Number of farm operators	335	320	275	-17.9	-14.1
Gender: Female - Number of farm operators	150	160	145	-3.3	-9.4
Number of operators on farms with one operator	190	165	145	-23.7	-12.1
Number of operators on farms with two or more operators	290	325	275	-5.2	-15.4
Age: Under 35 years - Number of farm operators	30	30	45	50.0	50.0
Age: 35 to 54 years - Number of farm operators	230	205	160	-30.4	-21.9
Age: 55 years and over - Number of farm operators	220	245	210	-4.5	-14.3
Average age of farm operators - Years	54	55	54	0.0	-2.0

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

Farms Direct Selling to Consumers in Algoma District – 2016 *

Agricultural products directly sold to consumers for human consumption - Farms reporting	109
Agricultural products directly sold to consumers for human consumption: Unprocessed agricultural products (fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) - Farms reporting	107
Agricultural products directly sold to consumers for human consumption: Value-added agricultural products (jellies, sausages, wine, cheese, etc.) - Farms reporting	11
Method used to sell to consumers directly for human consumption: Farm gate sales, stands, kiosks, U-pick - Farms reporting	102
Method used to sell to consumers directly for human consumption: Farmers' markets - Farms reporting	32
Method used to sell to consumers directly for human consumption: Community Supported Agriculture (CSA) - Farms reporting	13
Method used to sell to consumers directly for human consumption: Other methods - Farms reporting	6
* This data was not collected in previous Census periods	

Source: Statistics Canada, Census of Agriculture, 2016.