RAIN
RURAL AGRI-INNOVATION NETWORK

North Central Ontario Food and Agricultural Market Study

SUDBURY REGION REPORT

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Food and Agricultural Market Study

Sudbury Region

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City of Greater Sudbury

Bruce Mines Agricultural Society

Mill Market

Mississaugi First Nation

Wikwemikong Development Commission

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Executive Summary

Introduction

This report presents the findings of the North Central Ontario Food and Agricultural Market Study (NFAMS) for Sudbury region (Greater Sudbury / Sudbury District / West Nipissing).

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

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

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

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

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed. The majority of the businesses / organizations in the Sudbury region (over 55%) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group more than half feel that 'locally grown' refers to food produced specifically in the Algoma / Manitoulin / Sudbury. It's worth noting that over 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.

Businesses / organizations based in the Sudbury region 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 businesses / organizations (80%) based in the Sudbury region 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 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 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 Sudbury / West Nipissing based businesses / organizations show that there are a number of food commodities where there are significant local food deficits that could potentially be addressed by local producers / processors. The following table provides an overview of some of the larger local food deficits that were identified through the study.[1]

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Potatoes	over 160,000 kgs
Cauliflower	over 14,000 kgs
Lettuce	over 10,000 kgs
Tomatoes	over 5,000 kgs
Onions	over 3,500 kgs
Sweet corn	over 2,500 cobs
Carrots	over 1,800 kgs
Celery	over 700 kgs
Cabbage	over 600 kgs
Kale	over 500 kgs
Green beans	over 500 kgs
Squash	over 400 kgs
Spinach	over 300 kgs
Bell peppers	over 200 kgs
Apples	over 15,000 kgs
Mixed berries, frozen	over 500 kgs

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Beef – various cuts	over 3,500 kgs
Beef – hamburger	over 1,100 kgs
Pork – various cuts	over 7,100 kgs
Chicken – breast	over 5,300 kgs
Eggs, whole shell	over 3,600 dozen
Milk, fluid	over 60,000 litres
Cheese	over 200 kgs
Maple syrup	over 6,000 bottles
Honey	over 6,000 bottles
Wheat flour	over 7,000 kgs
Rye flour	over 1,200 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.

[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 emphasized that they are interested in building long-term relationships with buyers but in many cases the businesses / organizations they engage with don't hold the same level of interest and especially commitment.

Producers feel that more needs to be done to educate local businesses / consumers about the variety of food that's being grown locally and the unique conditions of farming in the region and how that factors into the pricing of locally grown items. It was suggested that the freshness and longer shelf life associated with locally grown produce needs to be more strongly promoted.

Producers strongly feel that local government needs to be more supportive of the agriculture sector (e.g. commit to meeting the needs of the sector, recognize and support new and innovative approaches to farming and ensure that policies support their growth).

Producers recognize that many businesses want the convenience of single point sourcing (vs dealing with a large collection of individual producers). Another notable challenge identified by producers is the need for localized infrastructure capacity that will enable producers to meet the food handling/safety certification and processing needs of some businesses / organizations – especially food retail and food services. A potential key action item going forward is to explore and support the development of a local Good Agricultural Practices (GAP) certified facility for handling / processing / labeling fresh produce products.

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of local 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 "Sudbury 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.[4]
    - 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).[5]

Sudbury Region Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for the region to utilize in food marketing campaigns (e.g. revitalise the 'Eat Local Sudbury' food branding campaign).
    - Emphasize the key values that local businesses / organizations associate with locally grown food in marketing campaigns (e.g. buying locally produced food contributes to the local economy / supports local businesses and families, locally produced food offers the highest quality / freshness and longer shelf life).

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[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] This scope/role of this facility would be somewhat different than the Eat Local Sudbury Co-operative which served mainly as a retail outlet before it ceased operations at the end of 2017.

[5] 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.[6]

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 the Sudbury region and includes select findings from Algoma District and Manitoulin District for comparison purposes.

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

2.0 Methodology & Context

2.1 Who Did We Speak With?

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

Key Informant Interviews with Businesses / Organizations
The intent of the study was to interview a sample of businesses / organizations across the Algoma / Manitoulin / Sudbury region to address the following areas of interest:[7]

- 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.[8] 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

[7] HCA developed the interview guide in collaboration with the RAIN Project Coordinator and the Project Steering Committee (see Appendix A).
[8] 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.[9]

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.[10]

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.

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

[9] 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.

[10] 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.

[11] 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.

[12] 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.

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 the Sudbury region, a total of 61 businesses / organizations were interviewed consisting of: [13]

- 14 food processing businesses
    - Includes bakeries/baked goods, preserves, confectionary, butchers/prepared meat processing, artisan wines/ciders, small batch spirits distillery, specialty teas
- 15 food retail businesses
    - Includes independent grocery stores and specialty stores (e.g. natural foods, organics, cheese)
- 23 food service businesses / organizations
    - Includes full service restaurants, cafes, diners, institutions (health care centre, long term care facility), accommodation establishments (inns, motels)
- 9 food programs
    - Includes food banks and community support services

The study reflects a small sample of local food procurement activities across the four areas of food demand and the results cannot be generalized across the broader population of businesses / organizations. However, the share of processing, retail and service related businesses / organizations in the sample is somewhat reflective of the distribution of the total population of these types of establishments across the study area.[14]

[13] 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.

[14] In our review of business tabulation data from Statistics Canada (2018) we note that in the Sudbury region (Sudbury District / Greater Sudbury / West Nipissing) there are a total of 28 food / beverage manufacturing businesses, 263 food retail and wholesale businesses, and 593 food service and accommodation businesses. See Appendix B for additional details.

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

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

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

The 61 businesses / organizations based in the Sudbury region are located in 20 different communities. Approximately 57% of the businesses / organizations are located in the City of Sudbury and 43% are located in smaller communities across the Sudbury region.

Table 2: Number of businesses / organizations interviewed by community

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

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

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

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

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

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

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

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

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

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

Focus Group Discussions with Food Producers / Harvesters

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

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

Table 5: Number of attendees at the focus group discussions

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

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

Secondary Data Review

HCA conducted a review of secondary data to provide context to the study. This included a review of NAICS business classification data from Statistics Canada[15] 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.

[15] 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 the Sudbury Region?

A review of data from the Census of Agriculture provides a snapshot of the breadth / diversity of agricultural production occurring in the Sudbury / West Nipissing region.

The 2016 Census counted 373 farms in the Sudbury / West Nipissing region, a 13% decrease from the 2006 census (427 farms). Over the same ten-year period the total reported farm area in the Sudbury / West Nipissing region declined from 117,046 acres in 2006 to 101,811 acres in 2016, or 13%.[16]

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 373 farms in the Sudbury / West Nipissing region reported a combined total of just over $31 million in gross farm receipts.[17]

Agricultural activity in the Sudbury / West Nipissing region is diverse and includes beef and dairy production, hog farming, poultry and egg production, sheep and goat farming, and apiculture.[18] Farmers in the region 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.[19]

Smaller acreage farms (under 70 acres) account for approximately 18% of the total farms in the Sudbury / West Nipissing region while mid-sized farms (70 - 239 acres) account for 39% of the total and larger acreage farms (240 acres+) account for 43% of the total farms.

The Sudbury / West Nipissing region reported 101,811 acres of farmland in 2016 of which approximately 47% is in crop production. Major field crops in terms of total acreage include hay

[16] 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 Sudbury District as defined by MPAC amounted to 207,611 acres which represents an additional 158,541 acres not captured in the Census of Agriculture. In 2016, the total farmland area for all of Nipissing District as defined by MPAC amounted to 141,135 acres which represents an additional 72,503 acres not captured in the Census of Agriculture.

[17] 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.

[18] 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.

[19] 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).

(29,362 acres – tame hay and alfalfa), oats (2,870 acres), canola (at least 2,674 acres), potatoes (at least 1,265 acres), barley (at least 765 acres), and soybeans (at least 730 acres). Other field crops grown on smaller acreages include spring and winter wheat, corn, rye, and buckwheat.

With respect to vegetables a total of 49 farms in the Sudbury / West Nipissing region reported growing field vegetables in 2016 amounting to over 200 acres of total production. Major field vegetables grown in terms of total acreage (excluding potatoes) include sweet corn (68 acres), carrots (10 acres), squash/zucchini (10 acres), tomatoes (8 acres), cucumbers (8 acres), and beets (7 acres). At least 9 acres of green beans and 5 acres of cabbage were grown along with other vegetable crops grown on smaller acreages include onions, peppers, cauliflower, broccoli, brussels sprouts, and lettuce. Although detailed data for greenhouse vegetable production is not available, the Census of Agriculture indicates that there was at least 3,000 sq ft of greenhouse space in vegetable production in 2016. The Census also indicates that there were at least one mushroom producer and 28 maple syrup producers in the Sudbury / West Nipissing region in 2016.

With respect to livestock and poultry production, there has been combination of growth and decline across the Sudbury / West Nipissing region in some categories. The region as a whole experienced a decline in cattle and calf numbers over the 2006 - 2016 period dropping from 9,461 to 7,806 animals. It's worth noting that most of loss occurred in Greater Sudbury and West Nipissing while the number of cattle and calves in Sudbury District (specifically beef cattle) expanded during the same period. Sheep production showed growth in some parts of the region with sheep and lamb numbers in West Nipissing expanding from 334 in 2006 to 1,119 in 2016. Goat production also experienced growth during this period across the Sudbury / West Nipissing region with the number of goats increasing from 812 in 2006 to 1,215 in 2016. Another area of growth in the Sudbury / West Nipissing region is poultry production where the number of hens and chickens increased from 2,596 in 2006 to 13,259 in 2016 (includes both laying hens and broiler/roaster birds).

With respect to the farm operator profile, the total number of farm operators in the Sudbury / West Nipissing region declined from 640 in 2006 to 550 in 2016 with most of the loss occurring in the Greater Sudbury. The share of women farm operators in the Sudbury / West Nipissing region increased slightly from 34% in 2006 to 36% in 2016.[20] Although the average age of farm operators in Sudbury District, Greater Sudbury and West Nipissing increased between 2006 and 2016, there has been a slight increase in the share of farm operators under 35 years of age (7% in 2006 vs. 8% in 2016). These changes are consistent with trends at the national level.[21]

In 2016, 31% of all farms in the Sudbury / West Nipissing region reported that they sold directly to consumers. This figure is almost three times higher than the national figure.[22] Of the 117 farms that were marketing directly to consumers in 2016, 96% sold unprocessed agricultural products (e.g. fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) while 12% sold value added products (e.g. jellies, sausages, etc.). The most common method used by

[20] 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

[21] 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.

[22] 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.

farmers to sell directly to consumers is through farm gate activities (e.g. stands, kiosks, u-pick) with 109 farms participating in this type of marketing activity. A total of 23 farms reported that they sell directly to consumers through farmers' markets and 7 farms reported that they utilize Community Supported Agriculture (CSA) methods for their sales activity.[23]

Note: data tables on agricultural production in Greater Sudbury, Sudbury District and West Nipissing from the Census of Agriculture (2006-2016) are presented in Appendix C.

Agricultural Infrastructure / Institutions / Associations in the Sudbury / West Nipissing Region

The agriculture sector in Sudbury / West Nipissing region is supported by a variety of hard and soft infrastructure assets. Hard infrastructure elements include abattoirs (Creative Meats – Warren; Birch Lake Abattoir -Massey; Valley Poultry Packers – Blezard Valley; K&S Family Farms – Powassan), dairy processing (Parmalat Canada Inc. – Sudbury; Nickel City Cheese – Sudbury; Farquhar Dairies Limited – Espanola), an egg grading station (Abraham and Minerva Frey - Township of Sables- Spanish River), fish processing (Herbert Fisheries – Killarney), a cooperative grain elevator is located in Verner (Verner Ag Center), and other food processing activities across the region (e.g. butchers, bakeries, brewery, spirits distillery). An agronomy research tests site is also located in Verner.[24]

The Sudbury / West Nipissing region also features several community farmers' markets including 'The Market' in Greater Sudbury, Capreol Market, Farmers' Market at Sturgeon River House Museum (West Nipissing).

A number of different producer and commodity groups / associations are active in Sudbury / West Nipissing region including:

- Association des cultivateurs de Chelmsford
- Sudbury / West Nipissing Cattlemen's Association
- Sudbury and District Beekeepers Association
- Sudbury Soil & Crop Improvement Association
- West Nipissing Soil and Crop Improvement Association
- West Nipissing / East Sudbury Dairy Producers Committee
- West Nipissing - East Sudbury Federation of Agriculture
- Ontario Sheep Farmer - District 11[25]

[23] 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

[24] Another asset that recently left the Sudbury landscape was the Eat Local Sudbury Co-operative which operated for about 10 years and closed at the end of 2017 due to financial challenges. The Co-operative operated a retail space where consumers could buy food from local farmers/producers (within a150 mile radius of Sudbury). Eat Local Sudbury was nonprofit and retail sales profits were re-invested into the co-op to pay for equipment, staff, and other overhead costs. Other key interests of the organization included building relationships between farmers and urban and/or non-farm based residents, providing information to the public about local food production, and keeping food dollars in the local economy.

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

- National Farmers' Union Ontario North

Another relevant organization in the region is the Greater Sudbury Food Policy Council.[26]

Additional information on Sudbury / West Nipissing agri-organizations and businesses including contact information can be obtained through the FarmNorth.com web portal.[27]

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.[28] 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.[29]

[26] The mission of the Food Council is to support the development of an equitable, vibrant and sustainable food system for the City of Greater Sudbury through research, advocacy and the dissemination of knowledge of food issues. The Council also works to foster collaboration and communication amongst other food system stakeholders including business, community organizations, individuals and government.
[27] www.farmnorth.com/District.aspx?district_id=9&name=Sudbury
www.farmnorth.com/District.aspx?district_id=6&name=Nipissing
[28] 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
[29] Ontario's Provincial Fish Strategy – Fish for the Future. 2015.

3.0 Results

Results Index

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

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

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

In the Sudbury region, 80% 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 13% 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 the Sudbury region, approximately 20% of the representatives interviewed identified local food as being something that is produced / harvested within the boundaries of Greater Sudbury/Sudbury District. A further 15% of the representatives identified local food as being something that is produced / harvested in the general area of Algoma / Manitoulin / Sudbury and 21% identified local food as being something that is produced / harvested in northern Ontario. Approximately 44% 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 Sudbury region are somewhat distinct from Manitoulin and Algoma Districts in that the Sudbury based businesses / organizations 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 the Sudbury / West Nipissing region elaborated on their views of what locally grown means to them. The following responses illustrate the variation in range that stakeholders associate with the term locally grown.

- *'Locally grown' is anything that is made by First Nations or within a First Nations community.*
- *Local is within the local community… I source locally grown foods from a farm that's four minutes away.*
- *We source our locally grown foods from farmers in Massey.*
- *I consider local to be anything within a 3-hour drive from us… this includes Sudbury and even Manitoulin island… but Sault Ste. Marie is a bit too far away to be considered local.*
- *Sudbury is immediate local but Ontario wide can be local as well*
- *Local for me is broad… I source my meats from Quebec with price being a key consideration.*
- *I place a priority on the Sudbury area but I have to go further sometimes for other ingredients such as rye and certain botanicals (e.g. Elmira, Ontario), coriander (Sask.), and occasionally blueberries (Nova Scotia)… I do what I can to keep everything Canadian.*
- *It depends on the context… Eat Local Sudbury defined "local" as within a 150km radius around Sudbury, which would include areas that fall into other districts. The Greater Sudbury Market uses a 240km radius to define what is local. Restricting the definition to just Sudbury, North Bay, etc. could be too rigid, but on the other hand, Northern Ontario could be too broad. The definition of local used by a producer or business will reflect their values and goals as a business and this can change. However, having a way to differentiate between "northern" and "southern" produced food is highly important as many consumers are looking for northern food.*
- *Local is Northern Ontario… but we need to source from southern Ontario for produce.*

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 the Sudbury region, the next most common approaches include subscribing to relevant newsletters / social media (25%), attending farmers' markets (25%), and communicating with food distributors (25%). Approximately 13% of the representatives from the Sudbury region are currently not taking any action to stay informed about local food options.

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

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

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

When we compare the results for large urban centres (Sault Ste. Marie and Sudbury) vs. smaller communities we find that for both groups the most common means by which businesses and organizations stay informed about local food options is through direct communication with growers and harvesters. However, a much higher proportion of the businesses / organizations based in the large urban centres are using direct communication compared to smaller communities in the study area (59% vs. 45%). In general, it appears that businesses / organizations based in the large urban centres are more active in staying informed about local food options. Compared to businesses / organizations based in smaller communities, a higher proportion of the urban based businesses / organizations stay informed by attending farmers' markets (26% vs. 16%) and subscribing to relevant newsletters and social media (23% vs. 17%). Urban based businesses / organizations also rely on food distributors / wholesalers to provide information to a much greater extent than businesses / organizations based in smaller communities (31% vs. 16%). An almost equal proportion of urban and small community based businesses / organizations are currently not taking any action to stay informed about local food options.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Representatives from the Sudbury region provided additional commentary on what motivates them to procure locally grown / harvested foods:

Food processor representatives

- *It's important to try and source some amount of locally grown foods to ensure that money stays in the community… this means trying to buy from local growers and also supporting local independent stores as much as possible.*
- *Locally grown foods have a lower cost because of transportation savings.*
- *Our key priority for sourcing locally grown foods is to support the local economy.*
- *It's important to support local farmers and keeping the economy diverse and strong.*

Food retail representatives

- *We support local because we believe that local products are fresher / healthier than food that you can get from the US or elsewhere – for our business, local means a better product.*
- *We like to be familiar with the local farmers who can tell us how their products are produced. We appreciate the work they do and know that it isn't easy for farmers to get their products out to some of the more remote communities.*
- *Sourcing locally grown is better for the environment.*
- *Supporting the local economy is the key motivation for buying locally grown foods.*

Food service representatives

- *I'm interested in learning / understanding every aspect of how food is produced – having a direct relationship with local farmers makes it easier to get information.*
- *Locally grown food is more sustainable.*
- *I want to support the local farmers… featuring local food on the menu is also a great marketing tool.*
- *Local food is fresher… it's not handled/processed as much as food from outside the area and it's fresher. I know the people and the territory where the food is grown and that's important to me.*
- *I respect how much effort local farmers put into growing food… I want to support the local economy.*
- *We're interested in sourcing organic products and it's reassuring knowing the local growers and their farm practices.*

Food program representatives

- *I've always had an interest in local food… it's important to support local farmers.*
- *Locally grown is fresher and healthier… it's important to reduce the amount heavily processed foods in our diets.*
- *Food security is an important issue… it's important to make an effort to produce and use as much local as we can without having to rely so heavily on food being transported in.*
- *Locally grown food tastes better and buying local supports the local economy.*
- *We have farmers as our neighbors in our small community and so when I think about supporting local it's more than just supporting the local economy – I'm supporting my neighbors. The community is very small and we are all closely connected.*
- *I would rather get the food we need from local farmers.*

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

Food processor representatives

- *Many of the ingredients I use are not grown locally… for example nuts and raisins. I use blueberries from Algoma District and my flour comes from western Canada.*
- *The quality of meat in the region isn't as high as I would like it to be.*
- *Locally grown foods need to be more competitively priced and there needs to be a greater variety of products.*
- *There needs to be more information available on what's being grown locally*
- *It's challenging to get locally grown products delivered to us.*
- *There are a limited number of producers in the region and the supply / availability of locally grown products is not always secure… in order to guard against supply disruptions it's important to be aware of other options (e.g. southern Ontario).*

Food retail representatives

- *I want strong assurances from producers that they are maintaining the practices they claim to be following (e.g. organically grown, humanely treated)… It's important to be able to trust the producers you buy from.*
- *We feature a lot of specialty items including health and food supplements and there are not many local companies making finished products.*
- *Locally grown foods are more expensive than non-local.*
- *Our ability to source locally grown is somewhat restricted by our contract arrangement with our national HQ. We source a limited amount of locally grown products (e.g. potatoes currently, strawberries and rutabagas in the past).*

- *Most of the farmers in the area are hobby farmers and do not produce large enough quantities for us to purchase.*

Food service representatives

- *Consumers are not well informed about locally grown options – there's a strong perception that locally grown is more expensive.*
- *Procuring locally grown is not as convenient as other options (e.g. placing a single order with a food wholesaler)*
- *It's important from a cooking / baking standpoint to have food products delivered that are consistent from day to day / week to week… the limited availability of locally grown food and short season makes it challenging to maintain the standard recipes that staff are trained for. It is much easier to order everything we need through a food wholesaler.*
- *We need products to be delivered to us and it needs to be delivered properly i.e. refrigerated truck.*
- *Local producers are not able to compete on price with food retailers / wholesalers – there can be a significant difference.*

Food program representatives

- *The growing season is very short so there is limited availability of locally grown food. There are also issues with the consistency of the product quality and so we rely on a food wholesaler. Product delivery considerations are also important… we have a very specific delivery date and sometimes it doesn't work with the farmer. Finally, there is the price point – we are grant funded so we operate on a tight budget and the locally grown option needs to be competitively priced.*
- *The supply of locally grown can vary considerably from week to week and year to year which makes it difficult to plan. We experienced a drop in funding which also impacts what we can do to procure locally grown.*
- *The farmers in the region are spread out and so accessing the food is not convenient if you're driving a distance and making multiple stops.*
- *Accessing the food is the main challenge we face… we currently only have volunteers working at the food bank and we have to be sensitive of their time (i.e. we can't ask them to spend a whole day driving around picking up donations). It's a real problem in our area – which can be classified as a food desert. A lot of people don't understand the challenges that our clients face in trying to access good food. There is a commuter bus that goes into Sudbury however the bus only runs in the morning and in the evening and so it's not as accessible as some would think for the elderly or working people to travel into Sudbury to do their shopping. The cost of the trip is also $5-6 and that's a lot of money for some people.*
- *Transportation can be a major challenge for us as we only have one driver and no one else is certified to drive the van – so if our driver is down we can't travel long distances to pick up food.*

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

Food processor representatives

- *We need a system / process to have locally grown products delivered.*
- *Information on the availability of locally grown products needs to be more readily available – and kept current.*

Food retail representatives

- *Producers could provide weekly communication of what is available with the corresponding pricing.*
- *We need a consistent/reliable food delivery system to get locally grown foods from the producer to the businesses.*
- *It would be helpful to have a local food distribution centre where they could see what locally grown products are available locally.*
- *A single website would be useful that shows farmer's products and prices.*
- *Local producers need to increase their volume of production – they cannot supply the volume I require.*
- *Need to ensure that food safety / handling guidelines are strictly adhered to. Some franchise outlets have very specific requirements (e.g. any meat product needs to be federally inspected).*
- *Perhaps if locally grown products were pooled through a cooperative, this would make purchasing the quantities we need more feasible.*
- *Need to promote and raise awareness about who is producing what type of food product and the quality and characteristics of the product (e.g. size, taste, freshness and overall look of the product). There also needs to be more availability of the product (i.e. greater volumes produced) and pricing within 10-15% of food sourced from outside the area.*

Food service representatives

- *We need to have advance assurances on delivery, availability, and price. Our season runs from May to October – however there's no local produce in May and June and sometimes even in July. By the month of May we've already established our supply lines.*
- *Availability / accessibility needs to be addressed – we need to access the food through our current food service network.*
- *It's unfortunate that the Eat Local Sudbury coop closed at the end of 2017. The community needs a replacement for this such as a local food terminal. Need to find the right formula to make it profitable for producers to supply and affordable for businesses to buy from.*
- *We need more information on what's available and better service with food delivery.*
- *Because we buy in large volumes, we need a consistent supply of whatever local item it is we are purchasing.*
- *It would be great to have an online ordering system in place to facilitate convenient purchasing of locally grown products – similar to what we have with our current supplier. At the moment we're using local products such as fruit as a food accent or a garnish rather than a primary ingredient in what we're making. It's hard to focus on the local products when these items are not offered by our regular suppliers.*

- *Affordability and transportation (better access) are the key things to be addressed but also expanding the variety of locally grown products and better promotion to ensure the businesses are aware of these options.*
- *There needs to be more availability of locally grown foods throughout the year.*
- *It's important for local growers to meet Public Health food safety standards – we need assurances from producers that their food handling procedures meets Public Health standards. Ideally, we need the same assurances that we can get through the major food wholesalers regarding food safety… it offers us peace of mind.*
- *There used to be a food co-op in the downtown area, but it was not very convenient.*
- *There needs to be more advertising about locally grown foods – i.e. types of products availability, delivery options, etc.*
- *More information is needed on where to source locally grown products.*
- *The price of locally grown needs to be competitive with other sources.*
- *If the price of local products could at least come close to the price of non-local products, that would be good. With the minimum wage increase, things are being stretched.*
- *It would help if local producers could be more competitive with pricing and if they could distribute through larger wholesalers – sometimes the delivery or the availability can be an obstacle.*
- *It's not a matter of finding enough supply… there is lots of local supply. The big issue is pricing… at the end of the day we have to think about our margins and locally grown food needs to be reasonably priced.*
- *I'm interested in sourcing more locally grown vegetables such as romaine lettuce, cucumbers, bell peppers, white onions, radishes – but the price needs to be competitive with suppliers like National Grocers and Walmart (fresh produce) and Costco (hamburger).*

Food program representatives

- *It would be helpful if farmers could somehow be incorporated into the large food distributors… the most difficult thing in their area is transportation (i.e. getting the food on time).*
- *It's important to get the information out there about where people can source local foods.*
- *Having more locally grown food available would be great. If there are some producers who want to donate food to the food bank it would be helpful if they could drop it off – or bring it to a centralized location where the volunteers could pick it up.*
- *Establishing a centralized location for picking up food would be helpful (rather than running to each of the individual farms).*
- *Having more stable funding for our food program.*

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 the **Sudbury / West Nipissing region only**. Interested stakeholders are encouraged to review the separate reports that were prepared for Algoma and Manitoulin to gain a fuller picture of the local food interests across the wider region. A separate, stand alone catalogue (Excel data file) has been prepared as part of this project which interested stakeholders can review in detail to understand local food interests at the level of the individual business / organization.

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

3.3.1 Food Services

Local food service representatives were invited to participate in a phone interview to discuss their local food procurement practices. In Sudbury, a total of 28 food service respondents agreed to participate in this study. The food categories identified by those in the Sudbury Food Service industry were vegetables, fruits and berries, proteins, dairy products, eggs, grains and 'other' products (i.e. beer & maple syrup). The following subsections provide a summary of the primary food items identified by those in the food service industry – highlighting products sourced in the largest quantities and providing high-level details on the preferred processed condition, delivery, and price of these items and their interest in procuring more of these food items locally.

Vegetables

Regarding the procurement of local vegetables, food services sourced potatoes, lettuce, tomatoes, carrots, and kale in the largest quantities.

Potatoes were the largest vegetable item referenced by respondents with over 30,200 kg sourced annually – of which over 26,800 kg were sourced locally (see table 18). All interviewees reported sourcing potatoes year-round (8 out of 8) with most saying that they have potatoes delivered directly to them (6 out of 8), fresh and unprocessed (8 out of 8), 1-2 times a week (7 out of 8). Everyone who was interviewed expressed an interest in sourcing more local potatoes, and three respondents said that they'd be willing to pay a premium price (up to 10% more) for a local product.

Lettuce was the second largest vegetable item sourced by food services. Interviewees reported sourcing 10,400 kg of lettuce every year – none of which was purchased locally (see table 18). All three respondents said that they source lettuce year-round and that they order it, fresh and unprocessed, 1-2 times a week. When asked about delivery preferences, two of three businesses said that they pick up their lettuce from a grocer/wholesaler. All three were interested in sourcing more lettuce locally, but only one said that they would be willing to pay a premium price (up to 10% more) for locally produced lettuce.

Tomatoes were the third largest vegetable product sourced by food services with respondents purchasing over 4,000 kg of tomatoes a year – 3,300 kg of which were purchased locally (see table 18). All three interviewees said that they purchase fresh whole tomatoes year-round with orders coming in 1-2 times a week. As with the lettuce, two interviewees said that they pick up their tomatoes from a grocer/wholesaler. Additionally, all three said that they would be interested in sourcing more local tomatoes with one saying that they would pay a premium price (up to 10% more) for local tomatoes.

Carrots were the fourth largest vegetable item sourced by foods services who reported purchasing over 2,200 kg every year – over 700 kg of which was sourced locally (see table 18). Half the respondents said that they prefer to have carrots delivered to them, 1-2 times a week, while the other half said that they prefer to pick up their order from a grocer/wholesaler. Respondents ordered both fresh and unprocessed (5 out of 6) and semi-processed carrots (2 out of 6). Regarding specific food standard preferences, half noted the importance of having the proper food safety certification (3 out of 6). When asked if they would be interested in sourcing more carrots locally nearly all of the interviewees said 'yes' (5 out of 6) however only one said that they would be willing to pay a premium price for local produce (up to 10% more).

Kale was the fifth largest vegetable product sourced by food services with interviewees reporting over 1,500 kg of kale sourced annually – with almost 1000 kg coming from a local source (see table 18). All the food service representatives said that they order fresh and unprocessed kale, year-round (4 out of 4). All the interviewees said that they have kale delivered directly to the restaurant with deliveries typically taking place 1-2 times a week (3 out of 4) or on an as needed basis (2 out of 4). When asked about sourcing more local kale, three out of the four respondents said that they would consider switching to a local source with one saying that they'd be willing to pay up to 10% more for local kale while the other two noted no difference in price between local and non-local kale.

Table 18: Amount of Vegetables Used by Food Services (n=29)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced From Elsewhere	Volume/Weight
Potatoes	30,259	26,850	3,409	Kg
Lettuce	10,420	-	10,420	Kg
Tomatoes	2,549	707	1,841	Kg
Carrots	2,273	717	1,557	Kg
Kale	1,577	984	592	Kg
Beets	707	707	-	Kg
Celery	707	-	707	Kg
Cabbage	653	-	653	Kg
Spinach	261	-	261	Kg
Cucumbers	230	-	230	Kg
Onions	87	-	87	Kg
Zucchini	36	36	-	Kg
Squash	20	5	15	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 – Proper food safety certification was the food standard preference most frequently cited by food service representatives (15 out of 29 products[30]) followed by unblemished/regular shaped products (10 out of 29). Other food standard considerations cited by food service representatives included: graded products, greenhouse produced, and good soil quality. It is important to note that while most interviewees held their producers to high standards several noted that not all produce has to look exactly the same, stating that oddly shaped or slight blemished products can still be incorporated in certain dishes (i.e. soups). One interviewee talked about how happy they were to have local produce available to them that they are less concerned about how the produce looks than they are about their ability to support local growers.

Delivery preferences – The majority of food service representatives indicated a preference for produce to be delivered directly to the restaurant, either by the producer or a wholesaler (27 out of 29), however there were some who indicated that they prefer to pick up the produce directly

[30] Note that this number references the total number of products, not the total number of interview respondents, as interviewees were able to speak to more than one product – each with their own food standard and delivery preferences.

from a grocer/wholesaler (16 out of 29) with one interviewee saying that they pick up their produce from a producer's roadside stand. Delivery frequency preferences ranged from 1-2 times a week (23 out of 29) to every 1-2 weeks (4 out of 29) or on an 'as needed' basis 2 out of 29).

Fruits and Berries

Regarding the procurement of fruits and berries, the top fruit items used by food services were mixed frozen berries, strawberries, and blueberries. Mixed frozen berries were the top fruit item sourced with interviewees purchasing over 650 kg of berries every year – with 130 kg sourced locally (see table 19). Only one interviewee discussed their use of frozen berries, indicating that they source bags of mixed berries (i.e. strawberries, raspberries, cherries, and a mixed berry) year-round with orders coming in several times a week. The majority of product was coming in from a large retailer however they do source a small amount of local berries when they are in season. This interviewee was interested in sourcing more berries locally, saying that they'd be willing to pay up to 10% more for a local product. Their main concern regarding switching suppliers had to do with the availability of fruit in the quantity and quality that they need.

Strawberries were the second largest fruit/berry product sourced by food services with respondents purchasing 250 kg of strawberries every year – 126 kg of which was sourced locally (see table 19) Of the four interviewees who reported on this item, three said that they order strawberries (fresh and unprocessed) seasonally. Half of the respondents had the strawberries delivered to them once or twice a week while in season, while the other half preferred to visit the producer or a local grocer to pick up the strawberries. All four respondents said that they would be interested in sourcing more local strawberries, with two saying that they would be willing to pay up to 20% more for a local product.

Blueberries are the third largest fruit/berry product sourced by food services at 160 kg sourced annually – 80 kg of which was sourced locally (see table 19). Two interviewees spoke to this product, with one respondent purchasing regular blueberries while the other purchased local wild blueberries once a year-when in season. This interviewee purchased the blueberries from local pickers who go foraging for berries in the summer and uses them as a speciality item on their menu. The other interviewee purchased blueberries year-round, purchasing local berries in the summer, with deliveries typically coming in twice a week. Both respondents said that they would be interested in sourcing more local blueberries and said that they would be willing to pay up to 20% more for a local product.

Table 19: Amount of Fruit Sourced by Food Services (n=14)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Frozen Berries	650	130	520	Kg
Strawberry	249	126	123	Kg
Strawberry	10	10	-	Flats
Blueberry	159	79	79	Kg
Wild blueberry	1	1	-	Kg
Apple	132	9	122	Kg
Apple	86	1	85	Cases
Apple	48	-	48	Bushel
Fresh fruit	25	5	20	Flats
Haskap Berries	2	2	-	Pints

Food Standard & Delivery Preferences (All Fruit Summary)

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

Food standard preferences – Interviewees most often said that they purchase fruit/berries that are fresh and unprocessed (13 out of 14 products) with a few saying that they purchase frozen fruit (3 out of 14). Food standard requirements that were cited most often were unblemished/ regular shaped products (7 out of 14), followed by having a food safety certification (6 out of 14), and produced as an outdoor field crop (6 out of 14). Only one interviewee noted the importance of an organic certification for fruit/berry products.

Delivery preferences – Food service interviewees purchased fruit/berry products seasonally (9 out of 14) and year-round (6 out of 14) with most expressing a preference to have fruit/berries delivered directly to the restaurant (10 out of 14) 1-2 times a week (7 out of 14). However, a few respondents noted that they go directly to the producer to get their berries with one noting that they go to a "you pick farm" in the summer (4 out of 14) to pick their own strawberries.

Proteins

Food service representatives identified beef, chicken, and fish as the top three protein items sourced throughout the year. Beef was the largest protein product at 7,000 kg sourced annually, of which over 2,300 kg were sourced locally (see table 20). Interviewees reported sourcing beef year-round with all but one requiring orders to be delivered directly to the restaurant (5 out of 6). Delivery frequencies ranged from once a week (4 out of 6) to once a month (2 out of 6). Food service respondents purchased both fresh (4 out of 6) and frozen (3 out of 6) beef products, with one interviewee saying that they purchase whole cows at a time. High quality meat cuts were identified as an important food standard for nearly all respondents, with interviewees saying that they purchase grade-A meat cuts or above (5 out of 6). Other food standard preferences included, food safety certification (5 out of 6), and pasture raised beef (4 out of 6). When asked about sourcing more of their beef locally all the interviewees said that they would be interested in sourcing more local products under the right circumstances, with two saying that they would be willing to pay a premium price (up to 20%) for local beef.

Chicken was the second largest protein product with interviewees reporting over 5,300 kg of chicken sourced annually (see table 20). All food service interviewees who spoke to this product said that they purchase chicken year-round, with most indicating a preference for direct delivery from a wholesaler 1-2 times a week (3 out of 4). Most food service respondents reported purchasing fresh chicken beasts (3 out of 4) while one interviewee indicated purchasing whole frozen birds. Nearly all the respondents indicated proper food safety certification as a primary food standard preference (3 out of 4), followed by grade-A+ meat products (1 out of 4), and free-range chickens (1 out of 4). Although none of this chicken is currently produced locally, all interviewees expressed an interest in sourcing local chicken, with one interviewee saying that they'd be willing to pay a premium price (up to 10% more) for a local product.

Fish was the third largest product identified by food service interviewees who reported sourcing over 1,700 kg annually – nearly all of which was sourced locally (see table 20). Respondents reported sourcing fresh fish both seasonally (1 out of 4) and year-round (3 out of 4). Most interviewees said they prefer to have their fish delivered directly from a producer (3 out of 4) while one respondent indicated a preference for picking up the fish from the producer directly.

Delivery frequencies also varied from 1-2 times a week (3 out of 4) to ordering on an 'as needed' basis (1 out of 4). When asked if they would be interested in sourcing more fish locally, one interviewee said that they would (and that they would be willing to pay up to 10% more for local fish), with the remaining three interviewees noting that they are currently ordering all they need.

Table 20: Amount of Proteins Used by Food Services (n=16)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Beef	7,098	2,366	4,732	Kg
Chicken	5,330	-	5,330	Kg
Chicken	156	-	156	Whole Animal
Fish (wild and/or cage raised)	1,736	1,450	286	Kg
Other: Sausage	1,400	1,400	-	Individual
Other: Hotdogs	1,120	-	1,120	Individual
Pork	408	-	408	Kg

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 – Food service interviewees reported purchasing their protein products both fresh (12 out of 16 products) and frozen (8 out of 16). Respondents identified food safety certifications (15 out of 16), high quality/grade proteins (13 out of 16), and grass fed and/or free-range animals (13 out of 16) as primary food standard preferences.

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

Beef	**Chicken**	**Fish**	**Pork**	**Other**
Beef Roasts	Whole bird	Whole fish	Pork loin	Sausage
Steaks (i.e. tenderloin, sirloin, striploin)	Chicken breasts	Fish fillets	Pulled pork	Hotdogs
Ribs				
Cubed beef				
Ground beef				
Chuck				

Delivery preferences – Food services typically preferred to have protein products delivered directly to them, either by a producer or wholesaler (12 out of 16), with a handful of interviewees saying that they prefer to visit the producer to pick up meat products (4 out of 16). Delivery frequencies ranged from 1-2 times a week (11 out of 16) to once a month (3 out of 16) with several interviewees indicating that they order on an 'as needed' basis (3 out of 16).

Dairy Products

Food service providers identified cheese and milk as the primary dairy products that they source. Cheese was the largest dairy product sourced, with interviewees purchasing 227 kg annually (see table 21). This quantity was procured by one food service provider who reported purchasing cheese year-round. Cheese orders were delivered by a wholesaler directly to the restaurant once a week. Blocks of cheese were delivered bagged or vacuum sealed and the interviewee specified having the proper 'food safety certification' as a primary food standard consideration. Although this interviewee isn't currently purchasing any of their cheese locally, they indicated an interest in sourcing more cheese locally and said that they would be willing to pay a premium price for locally produced cheese.

Fluid milk was the second largest dairy product sourced by food services, with interviewees reporting a total of 216 liters sourced annually – all of which was sourced locally (see table 21). This amount was also procured by one food service provider who reported sourcing white milk year-round. This respondent said that they generally purchase 4-liter bags of milk from the grocery store – noting that the milk they purchase comes from a local producer – once a week. When asked if they would be interested in sourcing more local dairy this interviewee said 'yes' however they would expect the cost to be comparable to what they're paying now.

Table 21: Amount of Dairy Sourced by Food Services (n=2)

Dairy	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Cheese	227	-	227	Kg
Milk	216	216	-	Liters

Eggs

Regarding the procurement of eggs, food service providers reported sourcing both whole chicken eggs and processed egg yolks (see table 22). Whole chicken eggs were sourced in the greatest quantity with interviewees purchasing 3,120 dozen eggs per year. This amount was sourced by one respondent who said that they source eggs year-round, from a wholesaler, who delivers eggs once a week. When asked about specific food standard preferences, this interviewee said that they order large white eggs in 15 dozen crates. Although this respondent wasn't sourcing any of their eggs locally at the time of the interview, they indicated an interest in sourcing eggs locally and said that they'd be willing to pay up to 20% more for a local product.

Processed egg yolks were also purchased by one interviewee, who sourced processed eggs year-round. This interviewee purchased their egg yolks through a wholesaler who delivers them, in 1-liter cartons, once a week. As with the whole eggs, this respondent said that they would be interested in sourcing processed eggs locally however the price would have to be competitive with what they're currently paying.

Table 22: Amount of Eggs Sourced by Food Services (n=2)

Eggs	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Chicken eggs	3,120	-	3,120	Dozen
Processed egg yolks	52	-	52	Liters

Grains, Oilseeds and Pulse Crops

Food service respondents identified breads and wheat flour as their main grain products sourced throughout the year. Breads were sourced in the greatest quantities with respondents reporting over 2,700 loaves of bread each year (see table 23). This quantity was sourced by one food service provider who spoke to three different types of bread that they regularly order (white bread, brown bread, and kaiser roles). This respondent said that they order breads year-round from a local bakery who delivers their orders several times a week. All the bread is delivered fresh and bagged with the respondent saying that they don't have any specific food standard requirements. The bread purchased is currently sourced locally and the interviewee said that they are willing to pay up to 20% more for local vs non-local breads. When asked if they would be interested in sourcing more local bread however, the interview respondent said 'no' as they are currently sourcing all that they need.

Wheat flour was the second largest grain product sourced by food services with respondents reporting 200 kg of flour sourced annually (see table 23). This quantity was reported on by one respondent who indicated sourcing flour year-round from a wholesaler who delivered the product, (bagged) directly to their store once a week. Although this food service provider isn't currently purchasing any of their flour locally, they expressed an interest in sourcing local flour and said that they would be willing to pay a premium price for a local product.

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

Grains	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Breads	2,704	2,704	-	Loaves
Wheat	200	-	200	Kg

Other Products

Food service respondents were given the opportunity to identify any 'other' products that they source throughout the year. Interviewees identified beer and maple syrup as primary 'other' products not previously discussed earlier in the interviewee. Beer was sourced in the greatest quantity with one food service provider sourcing over 32,700 liters of beer every year – with over 24,500 liters sourced locally (see table 24). All the beer was ordered in kegs with deliveries coming directly from the producer for local beer or through the beer store for non-local beer. The respondent indicated that they change between 2-4 kegs per week, and that the cost for local beer is actually 15% less than for beer from southern Ontario. Due to the lower cost and high quality of local beer, this interviewee said they would be interested in sourcing more of their beer locally should it become available.

Maple syrup was the second largest 'other' product sourced by food service providers with interviewees reporting that they purchase 164 liters of maple syrup annually. This quantity was sourced between two interview respondents and nearly all of the product was sourced locally (see table 24). Both respondents had the maple syrup delivered directly from the producer with one sourcing maple syrup year-round (placing orders every 1-2 months) and the other sourcing maple syrup seasonally (ordering twice a year). When asked about price, one respondent said that they would be willing to pay more for local maple syrup while the other said that the price is comparable. Both interviewees said that they are currently ordering what they need with one saying that they would be interested in sourcing more local maple syrup during the off-season, as they occasionally run out and will have to order maple syrup from elsewhere in Canada when local maple syrup is no longer in season.

Table 24: Amount of Other Products Sourced by Food Services (n=3)

Other Products	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Beer	32,760	24,570	8,190	Liters
Maple syrup	164	158	6	Liters

3.3.2 Food Retail

Representatives from the food retail industry were also invited to share information on their food procurement practices. A total of 13 Sudbury retailers participated in this study, and identified the following primary food categories: vegetables, fruits and berries, dairy products, eggs, and other products (i.e. honey & maple syrup). These items represent products that 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, providing high-level information on preferred process conditions, delivery, and price along with the respondent's interest in procuring these food items locally in the future.

Vegetables

Food retailers identified potatoes, cauliflower, and corn as the primary vegetable items sourced throughout the year. Potatoes were the largest vegetable item mentioned, with retailers sourcing over 580,000 kg every year – 422,000 kg of which was sourced locally (see table 25). All the interviewees said that they source potatoes year-round with most saying that they have potatoes delivered directly to the store 1-2 times a week (5 out of 6) with one respondent saying that they get deliveries in daily (1 out of 6). Potatoes were delivered fresh and unprocessed in 2-4 kg bags. When asked if they would be interested in sourcing more local potatoes all the interviewees said "yes" with for saying they'd be willing to pay a premium price (up to 10% more) for a local product.

At 14,000 kg, cauliflower was the second largest vegetable item sourced by food retailers (see table 25). This amount was sourced by one retailer who reported purchasing cauliflower seasonally with orders delivered directly to their store several times a week. They specified ordering fresh and pre-washed cauliflower, bagged, and shipped 12 to a box. When asked if they would be interested in sourcing more this retailer said 'yes, under the right circumstances' (i.e. quality, quantity, and price). When it came to price, this producer believed that the price would be comparable for local vs. non-local cauliflower.

Corn was the third largest vegetable item sourced by retailers, who reported sourcing over 3,600 kg annually – 2,900 kg of which came from a local source (see table 25). Corn was also mentioned by only one retailer, who indicated that they have fresh corn on the cob delivered to their store once a week while it is in season. This producer was also interested in sourcing more local corn, saying that they'd be willing to pay up to 10% more for local corn if it were available.

Table 25: Amount of Vegetables Used by Food Retailers (n=16)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced From Elsewhere	Volume/Weight
Potatoes	580,442	422,103	158,339	Kg
Cauliflower	14,150	-	14,150	Kg
Corn	3,628	2,902	726	Kg
Onions	3,401	-	3,401	Kg
Tomatoes	2,358	-	2,358	Kg
Kale	1,250	63	1,188	Bags
Kale	403	403	-	Kg
Beans	571	57	514	Kg
Squash	508	25	483	Kg
Carrots	98	7	91	Kg
Beets	96	5	91	Bunches
Cucumbers	60	6	54	Bushels

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 – Regarding food standard preferences, retailers most frequently mentioned high quality produce (i.e. unblemished/regular shaped or of a certain grade) (6 out of 16 products), followed by the importance of proper food safety certification (i.e. CanadaGAP) (4 out of 16) and products that are certified organic (3 out of 16). Other food standard preferences included: produced as an outdoor field crop (kale), produced in a greenhouse (kale), and having products cleared through a central distribution chain.

Delivery preferences – All of the retailers interviewed said that they need their produce to be delivered directly to the store either by a wholesaler (16 out of 16 datapoints) or by the producer (2 out of 16). Delivery frequencies ranged from daily (4 out of 16), to once a week (7 out of 16), and several times a week (8 out of 16).

Fruits and Berries

Apples were the only fruit item discussed in detail by food retailers who indicated sourcing 11,338 kg of apples every year (none sourced locally). This quantity was used by one retailer who said that they order fresh and unprocessed apples seasonally. The apples are delivered, in 18 kg bags, directly to the store several times a week. When asked about food standard/ consistency considerations, this interviewee said that they want a high-quality product that has all the necessary food safety certifications. When asked about their interest in switching to a local source the retailer said that they would be interested – provided they can get the quantity and quality that they need – but that they wouldn't be willing to pay a premium price for local apples.

Dairy Products

Regarding the procurement of local dairy products, one retailer reported sourcing 20 kg of cheese annually, half of which was sourced locally. This retailer reported sourcing cheese year-round with deliveries coming in once a week. Apart from the quantities and delivery method, the

interviewee didn't provide any additional detail on the types of cheese purchased or their specific food standard requirements. When asked about souring more cheese locally this retailer stated that they would be willing to pay a premium price for local cheese (up to 10% more). They concluded the interview saying that producers *"need to focus on quality, availability, and reasonably competitive pricing."*

Eggs

Regarding the procurement of local eggs, two retailers spoke to this product and reported sourcing 2,500 dozen local eggs per year. Retailers sourced eggs both seasonally (1 out of 2) and year-round (1 out of 2). Both retailers expressed a preference to have the eggs delivered, 1-2 times a week, however one said that they will also pick up their eggs from a wholesaler. Both retailers reported purchasing whole chicken eggs, however neither specified a preference for a specific size or colour (i.e. large vs. small, white vs. brown, etc.). When asked if they would be interested in sourcing more local eggs both retailers said 'yes,' with one retailer said that they would be willing to pay a premium price for local eggs.

Other Products

Retailers identified honey and maple syrup as their primary 'other' products sourced, purchasing over 10,000 bottles of each annually. Of this total over 4,000 bottles of both honey and maple syrup were reported to have been sourced locally (see table 26). For both products, retailers said that they source their product year-round and expressed a preference for honey/maple syrup orders to be delivered directly to their store (7 out of 7). Delivery frequencies varied from every 1-2 weeks (4 out of 7) to every 1-2 months (1 out of 7) with a couple retailers ordering on an 'as needed' basis. Retailers all ordered liquid honey/maple syrup, bottled[31] and shipped in boxes. When asked about specific food standard requirements, retailers identified having the proper 'food safety certification' as a main food standard preference (4 out of 7) with one noting that they prefer to purchase organic honey and another stating that they only purchase maple syrup from licenced producers.

Nearly all the retailers said that they would be interested in sourcing more local honey/maple syrup should it become available (6 out of 7) with four saying that they'd be willing to pay a premium price for a local product.[32] Although retailers were eager to source more local products, one noted the relationship building aspect to sourcing new products, saying *"I would like to get more local honey - but only if I know the producer and know it's a quality product. I don't buy honey from just anyone… [and would] rather be out of local honey than take on honey product from someone that I don't know."*

Table 26: Amount of Other Products Sourced by Food Retailers (n=7)

Other Products	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Honey	10,060	4,057	6,003	Bottles
Maple syrup	10,060	4,057	6,003	Bottles
Maple syrup	600	600	-	Liters

[31] 2 liter/1 liter/500 ml & 250 ml bottles
[32] Two said up to 10% more and two said up to 20% more.

3.3.3 Food Processing

A total of 13 food processing representatives from Sudbury participated in this study, identifying products that they are either currently sourcing locally or have the potential to be sourced locally at a later date. The top food categories discussed were fruits and berries, proteins, dairy products, eggs, grains, and others (i.e. honey, herbs, and tea). 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.

Fruits and Berries

Food processors sourced Haskap, Aronia, and Saskatoon berries in the greatest quantities. Haskap berries was the largest product procured by processors who reported sourcing 14,000 kg of local berries every year, followed by Aronia and Saskatoon berries at 2,000 kg each (see table 27). All these berries were used by one processor who grew them on their property. As such no delivery or packaging preferences were identified. This processor only used these berries when they were in season, however they would freeze surplus berries at the end of season to stretch out their processing season. All three berries were cleaned and processed under the current food safety certification guidelines. When asked about sourcing more this processor said that they were currently growing as much as they need.

Table 27: Amount of Fruit Sourced by Food Processors (n=7)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Haskap Berries	14,000	14,000	-	Kg
Aronia Berries	2,000	2,000	-	Kg
Saskatoon Berries	2,000	2,000	-	Kg
Sea Buckthorn Berries	1,000	1,000	-	Kg
Strawberry	192	58	134	Kg
Apple	180	54	126	Kg
Blueberry	163	49	114	Kg

Food Standard & Delivery Preferences (All Fruit Summary)

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

Food standard preferences – Although the top three berries were sourced by one respondent, a total of two food processors spoke to their use of fruit/berry products. Food standard preferences varied across both processors with one using only fresh and unprocessed berries while the other purchased frozen berries/fruit. Quality was important to both processors who identified food safety, organic, and produced as outdoor crops as primary food standard preferences.

Delivery preferences – None of the processors required direct delivery for fruit/berry products with one opting to go to the producer to pick up the fruit items and the other growing their fruit/berries. As a result, one processor used fruits/vegetables seasonally while the other was able to access their product year-round. The processor who picked up their fruits/berry orders typically picked them up several times a week.

Proteins

Regarding the procurement of proteins, pork was identified as the primary protein product sourced throughout the year. One processor spoke to this product and reported purchasing 2,000 packages of pork shoulders and 700 packages of pork loin every year (none of which was sourced locally). This processor sourced pork year-round with the product delivered weekly by another processor. When asked about their food standard preferences, the interviewee said that they purchase their meat fresh and certified through a recognised food safety program. When asked about price the processor said that they would not be willing to pay more for a local product and that they are currently not interested in sourcing pork from a local producer.

Dairy Products

Regarding the use of dairy products, two processors reported sourcing 910,000 liters of fluid milk every year – all of which they reported came from a local source. Both processors indicated sourcing milk year-round with a preference for milk to be delivered several times a week (2 out of 2) with one processor specifying that they order bulk shipments (1 out of 2). When asked about food standard preferences both processors said that having all the proper food safety requirements was important to them. These processors also said that they would be interested in sourcing more local dairy, with one processor saying that they'd be willing to pay a premium price (up to 10% more) for local dairy.

Eggs

Regarding the procurement of local eggs, processors reported sourcing 230 dozen eggs annually, none of which came from a local source. This quantity was sourced between two processors, both of which reported sourcing eggs year-round. Both processors expressed a preference to have eggs, delivered by a wholesaler, once a week and once a month respectively. When asked about food standard preferences, processors indicated a preference for large white eggs. Although neither processor was sourcing their eggs locally, both processors expressed an interest in procuring locally produced eggs and said that they would be willing to pay a premium price (up to 10% more) for local eggs.

Grains, Oilseeds and Pulse Crops

Processors identified wheat, oats, corn, and rye flour as primary grain products sourced. Wheat was the largest grain product with processors sourcing 22,800 kg of wheat flour annually – 15,600 kg of which was sourced locally (see table 28). This quantity was sourced between seven processors, most of which said that they source wheat year-round (6 out of 7). All but one processor expressed a preference for flour to be delivered directly to them (6 out of 7) with delivery frequencies ranging from once a week (1 out of 7) to once every 1-2 months (5 out of 7). One processor opting to purchase flour from the local grocery store on an 'as needed' basis. When asked about price and sourcing more flour locally all seven processors said that they would be interested in sourcing more local flour under the right conditions with five saying that they would be willing to pay a premium price (up to 10% more) for a locally produced product.

Table 28: Amount of Grains Sourced by Food Processors (n=10)

Grains	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Wheat	22,800	15,600	7,200	Kg
Wheat	18	-	18	Bags
Oats	7,200	7,200	-	Kg
Corn Flour	3,000	3,000	-	Kg
Rye Flour	1,200	-	1,200	Kg

Food Standard & Delivery Preferences (All Grain Summary)

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

Food standard preferences – Food processors reported that they purchase processed flour/oats, with one saying that they purchase whole wheat flour. Half of the interviewees identified food safety certification as a primary food standard preference while other processors simply said that they expect that *"grain products are properly cleaned at the mill as per industry standards."*

Delivery preferences – Regarding delivery preferences, processors said that they purchase grain products both seasonally (4 out of 10) and year-round (6 out of 10). Grain products were typically ordered in 20-25 kg bags (9 out of 10) and nearly all the processors expressed a preference for wheat products to be delivered (9 out of 10) either from a producer, processor, or wholesaler. Delivery frequencies ranged based on need with interviewees specifying deliveries that took place weekly (1 out of 10), monthly (1 out of 10), everyone 1-2 months (4 out of 10), and on an 'as needed' basis (1 out of 10).

Other Products

Processors identified honey, herbs, and tea as the main 'other' products sourced annually. Liquid honey was the main 'other' product sourced at a total of 200 kg every year (see table 29) – all of which was produced locally). This amount was sourced by one processor who purchased honey year-round. When asked about their delivery preferences, this processor indicated that they have their honey delivered from a wholesaler, every 1-2 weeks. Specific processing/food standard or price preferences were not given; however, the interviewee indicated an interested in sourcing more honey locally.

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

Other Products	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Honey	200	200	-	Kg
Herbs	10	-	10	Kg
Tea	9	-	9	Kg

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

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

Food standard preferences – Herbs and tea were both delivered processed (i.e. dried/roasted) and in bags. As previously stated, food standard preferences weren't provided for honey, however other processors specified having a 'food safety certification' as an important food standard preference (3 out of 4 products). Other important food standard details were that both the herbs and the tea were lab tested for safety and to maintain a consistent quality.

Delivery preferences – Across all three products, processors indicated sourcing them year-round (4 out of 4 products) and that they prefer to have orders delivered directly to them (4 out of 4). Nearly all the processors indicated placing orders on an 'as needed' basis (3 out of 4).

3.3.4 Food Programs

A total of seven food program interviewees participated in this study and discussed products that they are either currently sourcing locally or that have the potential to be sourced locally. Food program representatives identified vegetables, fruits and berries, proteins, dairy products, and eggs 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

Regarding the procurement of local vegetables, food programs identified potatoes, tomatoes, and lettuce as primary food items. Potatoes was the largest food item at 12,400 kg sourced annually – 7,400 kg of which was locally sourced (see table 30). A total of four food programs reported sourcing potatoes, with three saying that they source potatoes year-round and one seasonally. Half said that they have potatoes delivered weekly while the other two picked up potatoes from the producer or a food distribution center as needed. All potatoes were ordered fresh and unprocessed packaged in bags. When asked about sourcing more local potatoes, three said that they would be interested however none said that they could pay a premium price for local potatoes.

Tomatoes were the second largest vegetable item sourced by food programs at 4,500 kg sourced annually. Of this over 3,300 kg reportedly came from a local source (see table 30). Both food programs who source tomatoes said that they procure this product year-round. One program indicated weekly deliveries while the other ordered tomatoes in once a month. When asked about food standard preferences, both said that they order fresh and unprocessed tomatoes with one indicating a preference for a fresh and unblemished product and the other highlighting the importance of food safety certification. When asked about their interest in sourcing more local tomatoes both said that they would be interested with one indicating that they would be willing to pay up to 10% more for locally produced tomatoes.

Lettuce was the third largest vegetable product sourced by food programs with respondents sourcing over 2,700 kg of lettuce every year – 1,700 of which came from a local source (see table 30). All three food programs who spoke to this product said that they source fresh and unprocessed lettuce year-round with two saying that they have lettuce delivered weekly and one indicating monthly deliveries. Quality was important to all interviewees with one saying that they want product that is fresh and unblemished and two saying that it has to have the proper food safety certifications. All three food programs expressed an interest in sourcing more local lettuce with two saying that they'd be willing to pay a premium price for a local product (e.g. up to 10% more).

Table 30: Amount of Vegetables Used by Food Programs (n=15)

Vegetables	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Volume/Weight
Potatoes	12,456	7,416	5,040	Kg
Tomatoes	4,573	3,329	1,244	Kg
Lettuce	2,703	1,732	971	Kg
Carrots	1,587	1,391	196	Kg
Bell peppers	649	389	259	Kg
Spinach	147	88	59	Kg
Onions	54	-	54	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 – Regarding food standard preferences, food program respondents most frequently mentioned the importance of proper food safety certification (i.e. CanadaGAP) (8 out of 15 products), followed by certified organic produce (7 out of 15), products produced as an outdoor field crop (5 out of 15), and unblemished/regular shaped foods (5 out of 15).

Delivery preferences – Food program respondents were split when it came to delivery preferences with half requiring direct delivery from a producer or wholesaler and the other half opting to pick up produce from a producer, food market, or food bank warehouse. Delivery frequencies also varied with half of the respondents receiving weekly produce deliveries (7 out of 15) and the other half receiving orders 1-2 times a month (8 out of 15).

Fruits and Berries

Food programs identified apples and rhubarb as primary fruit/berry products with respondents sourcing over 6,500 kg of apples a year and nearly 200 kg of rhubarb (see table 31). All said that they source apples and rhubarb seasonally (4 out of 4) with the products typically delivered to them 1-2 times a week (3 out of 4). All the products were delivered fresh and unprocessed in bags (4 out of 4). When asked about specific food standard preferences half of the respondents said that they need the producers to have the proper food safety certification. All interviewees said that they would be interested in sourcing more apples and rhubarb from a local source however only one said that they'd be willing to pay a premium price for a local product.

Table 31: Amount of Fruit Sourced by Food Programs (n=4)

Fruit	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Apple	6,536	2,007	4,528	Kg
Rhubarb	197	197	-	Kg

Proteins

Regarding the procurement of local proteins, food program representatives identified various pre-processed meat products (i.e. ground beef), lunch meat, and chicken as their main protein products. The protein product sourced in the greatest quantity was a variety of cooked meats sourced by one food program who purchased 272 kg of pre-cooked meats for their program – as they don't have a kitchen that meets the required food safety requirements. All of this product was sourced year-round from a local processor however the interviewee noted that they didn't know where the meat was produced. Food safety was identified as a primary food standard preference for this interviewee along with animals that are grass fed and/or free range. When asked about price this respondent said that they would be willing to pay more for locally produced meat (up to 10% more), however they are currently not looking to source more at the moment, as they are currently sourcing all of the meat that they need.

Table 32: Amount of Proteins Used by Food Programs (n=3)

Proteins	Total Annual Amount Used	Amount Sourced Locally	Amount Sourced Elsewhere	Weight/Volume
Cooked meat	272	272	-	Kg
Lunch meat	150	-	150	Kg
Chicken	54	-	54	Kg

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 – Regarding food standard preferences, cooked meat was purchased packaged and frozen, lunch meat was purchased in vacuum sealed packages, and chicken was purchased fresh and whole. Food safety certification was identified by all three programs as a primary food standard preference along, followed by grass fed/free range animals (2 out of 3 products). All three interviewees were interested in supporting local businesses and two out of three said that they would be interested in sourcing more local products.

Delivery preferences – All three interviewees said that they source proteins year-round with two expressing a preference to have their meat products delivered to them. Delivery frequencies ranged across the board from once a week, once every two weeks, to once a month respectively.

Dairy Products
Food programs reported sourcing over 107,460 liters of liquid milk every year – 23,004 liters of which was sourced locally. This quantity was sourced across four programs who all reported sourcing milk year-round. Delivery methods varied across programs with one respondent saying that they have their milk delivered while the remaining three picked up their milk. Delivery frequencies also varied with half saying that they order milk 1-2 times a week and half saying 1-2 times a month.

Food safety was important to all respondents with interviewees saying that they require their dairy to be certified through the HACCP. When asked about sourcing more dairy locally all four said that they would be interested however the price would have to be comparable to what they're currently paying.

Eggs
Regarding the procurement of local eggs, food programs reported sourcing a total of 720 dozen chicken eggs per year. Of this total, 450 dozen reportedly came from a local source. This quantity was sourced across four different food programs, all of which said that they procure eggs year-round. All interviewees said that they purchase large- or extra-large eggs with two expressing a preference for white eggs and one expressing a preference for brown.

All interviewees said that they typically purchase their eggs from the local grocery store (with one program noting that they also receive donated eggs). Only one out of the four food programs indicated regular (weekly) purchases with the others ordering eggs twice a month (2 out of 4) and once a month (1 out of 4) respectively.

Regarding the cost of eggs, only one interviewee said that they would be willing to pay a premium price (up to 30% more) for local vs non-local eggs. However, three out of the four interviewees said that they would be interested in sourcing more local eggs under the right circumstances.

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

Two food producer focus groups were conducted in the in the Sudbury / West Nipissing region where local 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. One focus group was conducted with producers in Azilda and the other focus group was conducted with producers in Sturgeon Falls.

Findings from the Azilda Session

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

- It is very difficult to gain entry into the established supply chains of large corporate enterprises. These large entities typically prefer to sole source all of their food products through a limited number of major suppliers/distributors (e.g. GFS, SYSCO) – for the sake of convenience and/or cost savings when the supplier offers a discount on volume sales. Even when a local grower has the capacity to meet the demand needs across a large region (e.g. northern Ontario), some corporate enterprises are not interested unless the producer can supply all of their outlets across the province.
- With respect to the local independent grocery stores, it was observed that it's also challenging to get these stores to carry locally grown products even though these stores typically have greater contract allowances for sourcing a portion of their stock (5-10%) from other sources including local producers. A big factor is the convenience that retailers associate with procuring their food through a single or small number of distributors along with the convenience of a structured and certified delivery system. The independent stores also require all foods to be handled with the proper food safety certifications and for UPC codes and nutrient content labels to be in place before it arrives at their doorstep.
- Food retailers and other businesses as well as consumers need to be better educated about the realities of farm production… farm production processes take time to be established and there can be considerable variation with each production year (e.g. yields, standards). It was suggested that if retailers and other businesses are interested in supporting local growers it has to include a willingness to accept that there will be some inconsistencies in the supply and they need to be loyal to the local growers that are endeavouring to meet their food needs.

Attendees at the Azilda session also discussed some of the factors that are limiting the ability of producers to expand their operations.

- Several attendees expressed their concerns about the amount of prime agricultural land that's been lost to development.
- It was suggested that agriculture is not generally viewed by local government officials as an important sector of the economy and that as result agri-related issues are not prioritized. It was observed that government officials need to ensure that the MDS formula is closely followed and that ditches and drains in the region are routinely cleaned to ensure that the tile drainage systems on farms can work at their full capacity.
- It was suggested that the loss / breakdown of government farm extension services over the years has impacted the ability of farmers (especially new farmers) to gain important

knowledge and avoid costly mistakes as they progressively experiment with new varieties and production techniques.

- It was suggested that a federally inspected abattoir is needed in northeastern Ontario but viability of such a facility would be uncertain. It was noted that a market study that was conducted determined that many producers would only support the plant if it was located within a 30-minute driving distance.
- It was suggested that small scale producers struggle with value-added processing in terms of there being limited or no availability of facilities that they can use for food processing (e.g. produce washing, cutting, sorting, packaging, cold storage, etc.). However, it was also emphasized that farmers are very busy as it is with their production activities and not all farmers necessarily have the time or want to get involved in processing – which means that some value-added activities might be better suited for a third party to manage.
- It was suggested that many of the producers in the region rely on some portion of farm inputs / supplies from southern Ontario or elsewhere (e.g. fertilizer, seed, equipment) and the transportation costs associated with these inputs adds to their overall production costs making it more difficult to compete on price with food producers in the south.
- There are limited farm services in the region (e.g. farm equipment sales / service / parts / repairs, vet services) which can result in significant costs/delays when emergency or short notice services are needed.
- It was suggested that wheat could be grown in substantial quantities in the area but there is no immediate local grain elevator in the area for cleaning, drying and storage (other than the elevator in Verner) and so producers would have to deal with additional transportation costs that could severely impact their profit margins.
- One participant observed that it's difficult for producers that are operating small market garden type operations (typically selling through farmers' markets) to scale up their production and sustain consistent volumes which becomes very problematic for maintaining relations with buyers who expect/need producers to provide consistent volumes. When a producer fails to meet these needs, the buyer (e.g. grocery stores, institutions, restaurants) will turn elsewhere (e.g. major food distributors) and become very cautious about recommitting to supplies from local growers.
- One producer suggested that scaling up isn't always the best course of action because some types of food are still expensive to produce given the amount of personal care and attention that's required (e.g. hydroponic lettuce) and buyers will have to be prepared to pay a premium or the grower will lose money. However, the key selling point is that the fresh vegetable will last longer in the fridge and delivery can be weekly throughout the entire year – if the buyer is prepared / willing to pay a premium.
- It was noted that small producers that operate on a very small land base (e.g. 100 square feet - hydroponics, boutique farming) are not common in the area at this time and don't fit the traditional farm model. However, at least one local producer is trying this innovative approach with a hydroponic system built into a walk-in container. However, because it's a non-traditional approach to farming it's been more challenge for the producer to access technical advice and support services. Additionally, because the scale of the operation sits outside the customary farm definition with its exceptionally small footprint it does not qualify for a tax rebate even though the facility is producing the equivalent of about 2 acres of kale.

Attendees at the Azilda session were asked to comment on the key opportunities / areas for action that they see in marketing locally grown / harvested foods to local businesses and organizations.

- Producers suggested that there are significant opportunities for agriculture in the region including small producers and more needs to be done to support it (i.e. local government needs to take interest and respond to the needs of the sector).
- Producers believe that food grown / harvested in northern Ontario is higher quality and more flavourful than food produced in southern Ontario due to there being more contaminants in the south (pollutants, greater use of pesticides, herbicides) – which makes the northern product more attractive to consumers.
- Value-added processing infrastructure needs to be established in the region to meet the needs of buyers. For example, it was noted that institutions such as retirement homes and day care centres expect foods to be semi-processed when they arrive as they increasingly don't have the equipment or staff to do the processing at their site.

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 Sudbury / West Nipissing 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?

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

In general, the producers associate the term 'locally grown' with food items that are grown / harvested in northern Ontario. About 56% of the businesses / organizations interviewed shared a similar definition as the producers while about 44% held a broader definition that identified all of Ontario and/or Canada as locally grown. The interview results appeared to align with what many of the producers expected.

The interview results revealed that the most common factor motivating businesses / organizations to procure locally grown food is their interest to support the local economy (80%). This figure surprised the producers and they questioned how many businesses sincerely believe this vs. saying this because it's a nice thing to say but they don't necessarily follow through with actions to support it. Producers were also surprised to see that only about 16% of the businesses / organizations reported using 'locally grown' as part of their marketing. The producers thought that this figure would have been a bit higher as they've witnesses restaurants promoting locally grown.

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 (51%). Producers also recognized the other key concerns brought forward by businesses / organizations including the insufficient volume of production (38%) as well as issues related to seasonality / inconsistent availability (38%).

Findings from the Sturgeon Falls Session

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

- Producers expressed frustration with the lack of commitment / follow-up shown by buyers. It was noted that businesses will inquire about what producers are growing, sign up for their mailing list, ask for their price list, etc. but then they don't order anything and if they do it's often the case that they only want small quantities where the total value might amount to $25-$50 – which realistically isn't worth the time and cost to deliver. Another producer noted that small orders take the same administrative effort as large orders in terms of responding to questions, taking/confirming the order, processing the order, invoicing, etc. and it's very questionable whether the return on investment for the small orders is worth the effort.
- Producers also expressed frustration with the limited loyalty they experience from some buyers. As described by one producer, you can spend five years building a relationship with a buyer and meeting all of their needs in terms of providing the highest quality and always delivering on time and then suddenly find that the buyer takes his/her business elsewhere when they think they can save a dollar. It appears that many buyers don't attach the same significance to the relationship that growers do – i.e. growers put more of an investment in the relationship than buyers do.
- One producer observed that it's challenging to market locally grown food to businesses in the City of Sudbury because the city is so spread out and segmented.

Attendees at the Sturgeon Falls session also discussed some of the factors that are limiting the ability of producers to expand their operations.

- There are significant challenges in finding and maintaining skilled and reliable labour. Producers noted that the work ethic is typically poor and employees have high expectations in terms of pay ($20/hour) and hours of work (not willing to work for more than 30-40 hours per week). It takes a special attitude to work on a farm and people need to genuinely enjoy the work or it's a struggle for them. Another challenge is that work is often seasonal and it's a challenge for farmers to compete with other employers that can offer year-round employment (or with social assistance). It was further noted that mechanization cannot replace all of the labour needs as the equipment can't always be applied to small scale farming.
- The support services for farming in the region are limited compared to southern Ontario (e.g. limited farm equipment/supply sales and services). One producer observed that large animal vet services in the region are very limited and it's a demanding job for the vets as they cover a large geographic area. It was also noted that horticultural services in the region are extremely limited.
- With respect to meat processing capacity, the producers noted that there is one local abattoir but there is typically a waiting list and producers need to plan ahead when they want to take their stock in for processing. It was suggested that abattoirs in northern Ontario generally struggle with capacity and labour issues and that any of the abattoirs in the region with quality cutters are at full capacity.

Attendees at the Sturgeon Falls session were asked to comment on the key opportunities / areas for action that they see in marketing locally grown / harvested foods to local businesses and organizations.

- Producers emphasized the need for retailers to take on a greater role in promoting the locally grown products they carry (e.g. making highly visible and attractive displays, routinely refreshing the display) and educating consumers about the origin and value of the locally grown foods they offer (e.g. identifying the community where it came from, emphasizing the freshness and flavour qualities, explaining how the price reflects the true cost of production for local producers).
- Interest and demand for organically grown food is continuing to grow and the northern Ontario brand is attractive to consumers who view the region as less unspoilt compared to southern Ontario. It was also emphasised that producers in the region benefit from being located near major transportation arteries with accessible connections to southern Ontario markets.
- It was suggested that local maple syrup producers could use a packing plant.

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 Sudbury / West Nipissing based businesses / organizations from the four areas of food demand. The focus group attendees were invited to share their observations on the findings and the extent to which the findings were consistent / inconsistent with their personal views / experience.

In general, the producers associate the term ‘locally grown’ with food items that are grown / harvested in northeastern Ontario or more broadly in northern Ontario. About 56% of the businesses / organizations interviewed shared a similar definition as the producers while about 44% held a broader definition that identified all of Ontario and/or Canada as locally grown. The interview results appeared to align with what many of the producers expected.

The producers were surprised to see such a large proportion of the businesses / organizations claiming that they support buying locally grown because it contributes to the local economy (80%) and some producers suggested that businesses are saying one thing to be nice but acting in a very different way (i.e. only supporting local when it is convenient, cost efficient, etc.) Some producers were also surprised to see that only about 20% of the businesses / organizations reported using ‘locally grown’ because their customers are demanding it. At least one producer thought that this figure might have been somewhat higher while another producer suggested that a lot more work needs to be done to stimulate consumer interest in locally grown foods produced in the region (i.e. products grown in the Sudbury / West Nipissing region) vs. Ontario grown products – which is the local brand that most consumers are familiar / comfortable with.

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 (51%). Producers also recognized the other key concerns brought forward by businesses / organizations including the insufficient volume of production (38%) as well as issues related to seasonality / inconsistent availability (38%).

4.0 Conclusions & Recommendations

Conclusions

Agricultural production in the Sudbury / West Nipissing region 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), 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 the Sudbury region is not well understood. A key objective of this study was to engage with four areas of food demand in the region to expand our knowledge and awareness of how much interest businesses and organizations have in locally grown food, how they define 'locally grown' food, and the key factors that influence their decisions to source locally grown / harvested foods. Specifically, the four areas of food demand consist of:

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

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

The term 'local food' is broadly defined as food that is grown or harvested relatively close to where it is consumed. The majority of the businesses / organizations in the Sudbury region (over 55%) associate the term 'locally grown' with foods that are grown in northern Ontario and within this group more than half feel that 'locally grown' refers to food produced specifically in the Algoma / Manitoulin / Sudbury. It's worth noting that over 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.

Businesses / organizations based in the Sudbury region 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 businesses / organizations (80%) based in the Sudbury region 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 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 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 Sudbury / West Nipissing 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.[33]

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Potatoes	over 160,000 kgs
Cauliflower	over 14,000 kgs
Lettuce	over 10,000 kgs
Tomatoes	over 5,000 kgs
Onions	over 3,500 kgs
Sweet corn	over 2,500 cobs
Carrots	over 1,800 kgs
Celery	over 700 kgs
Cabbage	over 600 kgs
Kale	over 500 kgs
Green beans	over 500 kgs
Squash	over 400 kgs
Spinach	over 300 kgs
Bell peppers	over 200 kgs
Apples	over 15,000 kgs
Mixed berries, frozen	over 500 kgs

Commodity	Annual volume / weight currently sourced from outside the Algoma / Manitoulin / Sudbury area *
Beef – various cuts	over 3,500 kgs
Beef – hamburger	over 1,100 kgs
Pork – various cuts	over 7,100 kgs
Chicken – breast	over 5,300 kgs
Eggs, whole shell	over 3,600 dozen
Milk, fluid	over 60,000 litres
Cheese	over 200 kgs
Maple syrup	over 6,000 bottles
Honey	over 6,000 bottles
Wheat flour	over 7,000 kgs
Rye flour	over 1,200 kgs

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

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

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

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

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

[33] 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.

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 emphasized that they are interested in building long-term relationships with buyers but in many cases the businesses / organizations they engage with don't hold the same level of interest and especially commitment.

Producers feel that more needs to be done to educate local businesses / consumers about the variety of food that's being grown locally and the unique conditions of farming in the region and how that factors into the pricing of locally grown items. It was suggested that the freshness and longer shelf life associated with locally grown produce needs to be more strongly promoted.

Producers strongly feel that local government needs to be more supportive of the agriculture sector (e.g. commit to meeting the needs of the sector, recognize and support new and innovative approaches to farming and ensure that policies support their growth).

Producers recognize that many businesses want the convenience of single point sourcing (vs dealing with a large collection of individual producers). Another notable challenge identified by producers is the need for localized infrastructure capacity that will enable producers to meet the food handling/safety certification and processing needs of some businesses / organizations – especially food retail and food services. A potential key action item going forward is to explore and support the development of a local Good Agricultural Practices (GAP) certified facility for handling / processing / labeling fresh produce products.

Recommendations

The results of the NFAMS study are helpful for understanding the food needs and preferences of local 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.[34]
    - 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).[35]

[34] 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 "Sudbury 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.

[35] 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.[36]
  - 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).[37]

Sudbury Region Food Promotion / Branding

- Establish a cohesive 'locally grown brand' for the region to utilize in food marketing campaigns (e.g. revitalise the 'Eat Local Sudbury' food branding campaign).
  - Emphasize the key values that local businesses / organizations associate with locally grown food in marketing campaigns (e.g. buying locally produced food contributes to the local economy / supports local businesses and families, locally produced food offers the highest quality / freshness and longer shelf life).

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

[36] This scope/role of this facility would be somewhat different than the Eat Local Sudbury Co-operative which served mainly as a retail outlet before it ceased operations at the end of 2017.

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

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

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

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

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

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

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

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

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

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

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

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

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

Local Food Procurement Practices

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

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

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

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

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

Vegetables

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

Item 1:

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

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

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

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

If 'yes' or 'yes, with conditions'…

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

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

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

□ Other conditions, specify: _____

Frequency of delivery:

□ Daily □ Several times a week

□ Once a week □ Other conditions, specify: _____

Processed condition of product:

□ Fresh, unprocessed □ Fresh, washed

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

□ Frozen □ Frozen, washed

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

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

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

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

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

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

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

□ Yes □ No □ Not applicable

Item 2:

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

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

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

□ Yes □ No

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

Proteins

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

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

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

Item 1:

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

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

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

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

□ no

If 'yes' or 'yes, with conditions'…

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

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

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

Method of delivery:

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

Frequency of delivery:

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

Processed condition of product:

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

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

Specify: _____

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

Specify: _____

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

Specify: _____

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

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

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

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

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

Interview follow-up: What percentage?

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

□ Yes □ No □ Not applicable

Item 2:

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

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

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

□ Yes □ No

If so, please elaborate on the type and quantity.

Grains & Oilseeds & Pulse Crops

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

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

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

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

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

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

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

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

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

Dairy Products

17. Are dairy products important in your purchasing?

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

Item 1:

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

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

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

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

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

□ no

Additional comments: _____

If 'yes' or 'yes, with conditions'…

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

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

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

Method of delivery:

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

Frequency of delivery:

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

Processed condition of product:

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

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

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

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

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

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

Interview follow-up: What percentage?

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

□ Yes □ No □ Not applicable

Item 2:

You mentioned you also buy a lot of...

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

Eggs

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

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

Item 1:

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

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

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

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

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

□ no

If 'yes' or 'yes, with conditions'…

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

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

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

Method of delivery:

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

Frequency of delivery:

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

Whole, unprocessed eggs:

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

Processed eggs:

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

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

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

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

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

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

Interview follow-up: What percentage?

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

□ Yes □ No □ Not applicable

Item 2:

You also mentioned you buy a lot of...

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

Fruits and Berries

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

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

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

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

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

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

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

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

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

□ Yes □ No

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

Other

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

If so, please elaborate

Item 1:

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

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

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

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

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

□ no

If 'yes' or 'yes, with conditions'…

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

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

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

Method of delivery:

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

Frequency of delivery:

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

Processed condition of product, specify:

Packaging preferences, specify: _____

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

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

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

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

Interview follow-up: What percentage?

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

□ Yes □ No □ Not applicable

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

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

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

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

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

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

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

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

Thank you for participating in this interview!

Appendix B: Number of Businesses in Sudbury District / Greater Sudbury / West Nipissing by Select NAICS Classification

Food / beverage manufacturing establishments in Sudbury District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
31121	Flour milling and malt manufacturing	0	0	0	0	0	0	0	0	0	0
31122	Starch and vegetable fat and oil manufacturing	0	0	0	0	0	0	0	0	0	0
31123	Breakfast cereal manufacturing	0	0	0	0	0	0	0	0	0	0
31131	Sugar manufacturing	0	0	0	0	0	0	0	0	0	0
31134	Non-chocolate confectionery manufacturing	0	0	0	0	0	0	0	0	0	0
31141	Frozen food manufacturing	0	0	0	0	0	0	0	0	0	0
31142	Fruit and vegetable canning, pickling and drying	0	0	0	0	0	0	0	0	0	0
31151	Dairy product (except frozen) manufacturing	0	0	0	1	0	0	0	0	0	1
31152	Ice cream and frozen dessert manufacturing	0	0	0	0	0	0	0	0	0	0
31161	Animal slaughtering and processing	0	0	0	0	0	0	0	0	0	0
31171	Seafood product preparation and packaging	0	0	0	0	0	0	0	0	0	0
31181	Bread and bakery product manufacturing	0	0	0	0	0	0	0	0	0	0
31182	Cookie, cracker and pasta manufacturing	0	0	0	0	0	0	0	0	0	0
31183	Tortilla manufacturing	0	0	0	0	0	0	0	0	0	0
31191	Snack food manufacturing	0	0	0	0	0	0	0	0	0	0
31192	Coffee and tea manufacturing	0	0	0	0	0	0	0	0	0	0
31193	Flavouring syrup and concentrate manufacturing	0	0	0	0	0	0	0	0	0	0
31194	Seasoning and dressing manufacturing	0	0	0	0	0	0	0	0	0	0
31199	All other food manufacturing	1	0	0	0	0	0	0	0	2	3
3121	Beverage manufacturing	0	0	0	0	0	0	0	0	1	1
Total number of businesses		**1**	**0**	**0**	**1**	**0**	**0**	**0**	**0**	**3**	**5**

Source: Statistics Canada, 2018

Food / beverage manufacturing establishments in Greater Sudbury, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
31121	Flour milling and malt manufacturing	0	0	0	0	0	0	0	0	0	0
31122	Starch and vegetable fat and oil manufacturing	0	0	0	0	0	0	0	0	0	0
31123	Breakfast cereal manufacturing	0	0	0	0	0	0	0	0	0	0
31131	Sugar manufacturing	0	0	0	0	0	0	0	0	0	0
31134	Non-chocolate confectionery manufacturing	0	0	0	0	0	0	0	0	0	0
31141	Frozen food manufacturing	0	0	0	0	0	0	0	0	1	1
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	1	0	0	0	0	0	1
31152	Ice cream and frozen dessert manufacturing	0	0	0	0	0	0	0	0	0	0
31161	Animal slaughtering and processing	0	0	0	1	0	0	0	0	0	1
31171	Seafood product preparation and packaging	0	0	0	0	0	0	0	0	0	0
31181	Bread and bakery product manufacturing	0	1	1	2	0	0	0	0	0	4
31182	Cookie, cracker and pasta manufacturing	0	0	0	0	0	0	0	0	0	0
31183	Tortilla manufacturing	0	0	0	0	0	0	0	0	0	0
31191	Snack food manufacturing	0	0	0	0	0	0	0	0	3	3
31192	Coffee and tea manufacturing	0	0	1	0	0	0	0	0	0	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	0	0	0	0	0	0	1	1
3121	Beverage manufacturing	4	0	1	1	0	0	0	0	1	7
Total number of businesses		**4**	**1**	**3**	**5**	**0**	**0**	**0**	**0**	**6**	**19**

Source: Statistics Canada, 2018

Food / beverage manufacturing establishments in West Nipissing, 2018

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

Source: Statistics Canada, 2018

Food retail establishments in Sudbury District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
44511	Supermarkets and other grocery (except convenience) stores	0	1	2	2	1	0	0	0	3	9
44512	Convenience stores	3	4	0	0	0	0	0	0	4	11
44521	Meat markets	0	1	0	0	0	0	0	0	0	1
44522	Fish and seafood markets	0	0	0	0	0	0	0	0	0	0
44523	Fruit and vegetable markets	0	0	0	0	0	0	0	0	0	0
44529	Other specialty food stores	0	1	0	0	0	0	0	0	2	3
44531	Beer, wine and liquor stores	8	1	3	0	0	0	0	0	1	13
Total number of businesses		**11**	**8**	**5**	**2**	**1**	**0**	**0**	**0**	**10**	**37**

Source: Statistics Canada, 2018

Food retail establishments in Greater Sudbury, 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	2	0	2	5	6	4	1	0	7	27
44512	Convenience stores	18	23	6	2	0	0	0	0	12	61
44521	Meat markets	1	2	2	1	0	0	0	0	2	8
44522	Fish and seafood markets	0	1	0	0	0	0	0	0	0	1
44523	Fruit and vegetable markets	0	0	0	0	2	0	0	0	1	3
44529	Other specialty food stores	6	6	4	1	0	0	0	0	15	32
44531	Beer, wine and liquor stores	8	7	14	0	0	0	0	0	0	29
Total number of businesses		**35**	**39**	**28**	**9**	**8**	**4**	**1**	**0**	**37**	**161**

Source: Statistics Canada, 2018

Food retail establishments in West Nipissing, 2018

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

Source: Statistics Canada, 2018

Food wholesale establishments in Sudbury 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	0	0
41312	Dairy and milk products merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41313	Poultry and egg merchant wholesalers	0	0	0	0	0	0	0	0	1	1
41314	Fish and seafood product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41315	Fresh fruit and vegetable merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41316	Red meat and meat product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41319	Other specialty-line food merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41321	Non-alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41322	Alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
Total number of businesses		**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**1**

Source: Statistics Canada, 2018

Food wholesale establishments in Greater Sudbury, 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	1	0	1	0	0	0	0	4	6
41312	Dairy and milk products merchant wholesalers	1	0	0	0	0	0	0	0	1	2
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	2	0	1	0	0	0	1	4
41316	Red meat and meat product merchant wholesalers	1	0	0	0	0	0	0	0	0	1
41319	Other specialty-line food merchant wholesalers	6	5	3	1	0	0	0	0	8	23
41321	Non-alcoholic beverage merchant wholesalers	1	0	1	2	0	0	0	0	0	4
41322	Alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
Total number of businesses		**9**	**6**	**6**	**4**	**1**	**0**	**0**	**0**	**14**	**40**

Source: Statistics Canada, 2018

Food wholesale establishments in West Nipissing, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
41311	General-line food merchant wholesalers	0	0	0	0	0	0	0	0	1	1
41312	Dairy and milk products merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41313	Poultry and egg merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41314	Fish and seafood product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41315	Fresh fruit and vegetable merchant wholesalers	1	0	0	0	0	0	0	0	0	1
41316	Red meat and meat product merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41319	Other specialty-line food merchant wholesalers	0	0	0	0	0	0	0	0	2	2
41321	Non-alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
41322	Alcoholic beverage merchant wholesalers	0	0	0	0	0	0	0	0	0	0
Total number of businesses		**1**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**3**	**4**

Source: Statistics Canada, 2018

Food service establishments in Sudbury District, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
72231	Food service contractors	0	1	1	0	0	0	0	0	0	2
72232	Caterers	0	0	0	0	0	0	0	0	1	1
72233	Mobile food services	1	0	0	0	0	0	0	0	0	1
72241	Drinking places (alcoholic beverages)	1	0	0	0	0	0	0	0	1	2
72251	Full-service restaurants and limited-service eating places	5	8	4	5	3	0	0	0	12	37
Total number of businesses		**7**	**9**	**5**	**5**	**3**	**0**	**0**	**0**	**14**	**43**

Source: Statistics Canada, 2018

Food service establishments in Greater Sudbury, 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	7	8	2	0	2	0	0	0	3	22
72232	Caterers	2	4	2	2	0	0	0	0	7	17
72233	Mobile food services	2	1	0	0	0	0	0	0	5	8
72241	Drinking places (alcoholic beverages)	5	3	4	3	0	0	0	0	3	18
72251	Full-service restaurants and limited-service eating places	36	38	73	92	15	0	0	1	60	315
Total number of businesses		**52**	**54**	**81**	**97**	**17**	**0**	**0**	**1**	**78**	**380**

Source: Statistics Canada, 2018

Food service establishments in West Nipissing, 2018

NAICS Code	NAICS Description	Number of Businesses									
		1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500+ Employees	Indeterminate	Total
72231	Food service contractors	0	0	0	0	0	0	0	0	0	0
72232	Caterers	0	0	0	0	0	0	0	0	1	1
72233	Mobile food services	0	0	0	0	0	0	0	0	0	0
72241	Drinking places (alcoholic beverages)	0	1	0	0	0	0	0	0	2	3
72251	Full-service restaurants and limited-service eating places	2	4	10	5	1	0	0	0	9	31
Total number of businesses		**2**	**5**	**10**	**5**	**1**	**0**	**0**	**0**	**12**	**35**

Source: Statistics Canada, 2018

Accommodation establishments in Sudbury 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	5	5	1	3	0	0	0	0	17	31
72119	Other traveller accommodation	8	2	1	1	0	0	0	0	19	31
72131	Rooming and boarding houses	0	0	0	0	0	0	0	0	2	2
Total number of businesses		**13**	**7**	**2**	**4**	**0**	**0**	**0**	**0**	**38**	**64**

Source: Statistics Canada, 2018

Accommodation establishments in Greater Sudbury, 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	4	3	13	2	1	0	0	14	51
72119	Other traveller accommodation	2	1	0	0	0	0	0	0	3	6
72131	Rooming and boarding houses	0	0	0	0	0	0	0	0	2	2
Total number of businesses		**16**	**5**	**3**	**13**	**2**	**1**	**0**	**0**	**19**	**59**

Source: Statistics Canada, 2018

Accommodation establishments in West Nipissing, 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	3	0	0	1	0	0	0	0	9	13
72119	Other traveller accommodation	2	0	0	0	0	0	0	0	7	9
72131	Rooming and boarding houses	0	0	0	0	0	0	0	0	0	0
Total number of businesses		**5**	**0**	**0**	**1**	**0**	**0**	**0**	**0**	**16**	**22**

Source: Statistics Canada, 2018

Community food services in Sudbury District, 2018

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

Source: Statistics Canada, 2018

Community food services in Greater Sudbury, 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	1	1	1	0	0	0	0	0	3	6

Source: Statistics Canada, 2018

Community food services in West Nipissing, 2018

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

Source: Statistics Canada, 2018

Appendix C: Agricultural Production in Sudbury District / Greater Sudbury / West Nipissing

Number of Farms in Sudbury / West Nipissing by Farm Area – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	143	141	138	-3.5	-2.1	160	141	124	-22.5	-12.1	124	112	111	-10.5	-0.9
Total farm area: Under 10 acres	3	3	2	-33.3	-33.3	10	10	14	40.0	40.0	5	2	5	0.0	150.0
Total farm area: 10 to 69 acres	3	9	11	266.7	22.2	40	36	43	7.5	19.4	10	10	13	30.0	30.0
Total farm area: 70 to 129 acres	9	9	13	44.4	44.4	52	49	27	-48.1	-44.9	16	14	14	-12.5	0.0
Total farm area: 130 to 179 acres	31	34	21	-32.3	-38.2	25	20	18	-28.0	-10.0	14	18	15	7.1	-16.7
Total farm area: 180 to 239 acres	20	14	21	5.0	50.0	10	5	4	-60.0	-20.0	7	5	11	57.1	120.0
Total farm area: 240 to 399 acres	34	28	29	-14.7	3.6	13	12	4	-69.2	-66.7	28	27	19	-32.1	-29.6
Total farm area: 400 to 559 acres	15	22	16	6.7	-27.3	4	3	8	100.0	166.7	22	17	13	-40.9	-23.5
Total farm area: 560 to 759 acres	14	13	12	-14.3	-7.7	4	4	3	-25.0	-25.0	11	4	11	0.0	175.0
Total farm area: 760 to 1,119 acres	12	8	10	-16.7	25.0	1	1	3	200.0	200.0	9	11	5	-44.4	-54.5
Total farm area: 1,120 to 1,599 acres	1	-	2	100.0	-	1	1	-	-100.0	-100.0	2	3	5	150.0	66.7
Total farm area: 1,600 to 2,239 acres	1	-	-	-	-	-	-	-	-	-	0	1	-	-	-
Total farm area: 2,240 to 2,879 acres	0	1	1	-	0.0	-	-	-	-	-	0	-	-	-	-
Total farm area: 2,880 to 3,519 acres	0	-	-	-	-	-	-	-	-	-	0	-	-	-	-
Total farm area: 3,520 acres and over	0	-	-	-	-	-	-	-	-	-	0	-	-	-	-

- Nil or zero

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

Gross Farm Receipts for Sudbury / West Nipissing – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total gross farm receipts (excluding sales of forest products) in the calendar year prior to the census or for the last complete accounting (fiscal) year prior to the census - Amount $	12,611,432	8,172,421	9,916,199	-21.4	21.3	9,576,636	10,137,184	10,654,624	11.3	5.1	9,316,547	9,933,104	11,618,485	24.7	17.0
Under $10,000 - Farms reporting	59	63	50	-15.3	-20.6	87	73	67	-23.0	-8.2	40	28	29	-27.5	3.6
$10,000 to $24,999 - Farms reporting	38	30	27	-28.9	-10.0	33	27	23	-30.3	-14.8	26	32	24	-7.7	-25.0
$25,000 to $49,999 - Farms reporting	17	18	24	41.2	33.3	14	12	10	-28.6	-16.7	20	16	14	-30.0	-12.5
$50,000 to $99,999 - Farms reporting	11	12	17	54.5	41.7	8	9	5	-37.5	-44.4	11	8	16	45.5	100.0
$100,000 to $249,999 - Farms reporting	8	11	12	50.0	9.1	7	10	11	57.1	10.0	13	14	12	-7.7	-14.3
$250,000 to $499,999 - Farms reporting	7	3	2	-71.4	-33.3	7	6	4	-42.9	-33.3	13	10	12	-7.7	20.0
$500,000 to $999,999 - Farms reporting	2	4	6	200.0	50.0	2	2	2	0.0	0.0	1	4	4	300.0	0.0
$1,000,000 to $1,999,999 - Farms reporting	0	-	-	-	-	2	1	-	-100.0	-100.0	0	-	-	-	-
$2,000,000 and over - Farms reporting	1	-	-	-	-	-	1	2	-	100.0	0	-	-	-	-

- Nil or zero

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

Number of Farms in Sudbury / West Nipissing by Farm Type – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farms	143	141	138	-3.5	-2.1	160	141	124	-22.5	-12.1	124	112	111	-10.5	-0.9
Beef cattle ranching and farming, including feedlots	44	26	28	-36.4	7.7	24	10	7	-70.8	-30.0	24	18	16	-33.3	-11.1
Dairy cattle and milk production	17	13	8	-52.9	-38.5	-	-	-	-	-	15	9	6	-60.0	-33.3
Hog and pig farming	0	-	-	-	-	1	-	1	0.0	-	2	2	1	-50.0	-50.0
Poultry and egg production	2	2	2	0.0	0.0	6	3	6	0.0	100.0	0	-	2	-	-
Chicken egg production	2	2	2	0.0	0.0	2	2	4	100.0	100.0	0	-	1	-	-
Broiler and other meat-type chicken production	0	-	-	-	-	2	1	1	-50.0	0.0	0	-	-	-	-
Turkey production	0	-	-	-	-	1	-	-	-100.0	-	0	-	-	-	-
Poultry hatcheries	0	-	-	-	-	-	-	-	-	-	0	-	-	-	-
Combination poultry and egg production	0	-	-	-	-	-	-	-	-	-	0	-	1	-	-
All other poultry production	0	-	-	-	-	1	-	1	0.0	-	0	-	-	-	-
Sheep and goat farming	1	4	2	100.0	-50.0	1	4	3	200.0	-25.0	2	1	3	50.0	200.0
Sheep farming	1	2	2	100.0	0.0	-	-	-	-	-	0	-	3	-	-
Goat farming	0	2	-	-	-	1	4	3	200.0	-25.0	2	1	-	-	-
Other animal production	17	26	21	23.5	-19.2	44	42	28	-36.4	-33.3	15	9	11	-26.7	22.2
Apiculture	1	1	1	0.0	0.0	3	8	4	33.3	-50.0	0	-	2	-	-
Horse and other equine production	7	10	9	28.6	-10.0	35	33	15	-57.1	-54.5	5	2	2	-60.0	0.0
Fur-bearing animal and rabbit production	0	-	-	-	-	-	-	-	-	-	0	1	1	-	0.0
Animal combination farming	6	13	9	50.0	-30.8	4	-	7	75.0	-	10	6	5	-50.0	-16.7
All other miscellaneous animal production	3	2	2	-33.3	0.0	2	1	2	0.0	100.0	0	-	1	-	-

Oilseed and grain farming	1	3	4	300.0	33.3	3	3	5	66.7	66.7	5	17	21	320.0	23.5
Soybean farming	0	2	-	-	-	-	1	1	-	0.0	0	3	4	-	33.3
Oilseed (except soybean) farming	0	-	-	-	-	-	-	-	-	-	1	3	2	100.0	-33.3
Dry pea and bean farming	0	-	-	-	-	-	-	-	-	-	0	-	-	-	-
Wheat farming	0	-	2	-	-	-	-	-	-	-	0	-	1	-	-
Corn farming	0	-	-	-	-	-	-	-	-	-	0	-	1	-	-
Other grain farming	1	1	2	100.0	100.0	3	2	4	33.3	100.0	4	11	13	225.0	18.2
Vegetable and melon farming	3	-	5	66.7	-	9	11	15	66.7	36.4	2	2	5	150.0	150.0
Potato farming	1	-	-	-	-	7	8	8	14.3	0.0	1	-	1	0.0	-
Other vegetable (except potato) and melon farming	2	-	5	150.0	-	2	3	7	250.0	133.3	1	2	4	300.0	100.0
Fruit and tree nut farming	2	2	1	-50.0	-50.0	5	5	4	-20.0	-20.0	3	2	1	-66.7	-50.0
Greenhouse, nursery and floriculture production	7	6	3	-57.1	-50.0	16	15	15	-6.3	0.0	4	4	1	-75.0	-75.0
Mushroom production	0	-	-	-	-	-	-	-	-	-	0	-	-	-	-
Other food crops grown under cover	0	1	-	-	-	2	1	-	-100.0	-100.0	1	-	-	-	-
Nursery and tree production	3	2	1	-66.7	-50.0	9	11	9	0.0	-18.2	1	3	1	0.0	-66.7
Floriculture production	4	3	2	-50.0	-33.3	5	3	6	20.0	100.0	2	1	-	-	-
Other crop farming	49	59	64	30.6	8.5	51	48	40	-21.6	-16.7	52	48	44	-15.4	-8.3
Hay farming	43	50	58	34.9	16.0	47	37	30	-36.2	-18.9	38	40	32	-15.8	-20.0
Fruit and vegetable combination farming	0	1	-	-	-	1	4	5	400.0	25.0	1	-	1	0.0	-
Maple syrup and products production	N/A	-	1	-	-	N/A	1	1	-	0.0	N/A	2	3	-	50.0
All other miscellaneous crop farming	6	8	5	-16.7	-37.5	3	6	4	33.3	-33.3	13	6	8	-38.5	33.3

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

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

Land Tenure in Sudbury / West Nipissing by Acreage – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area – Farms reporting	143	141	138	-3.5	-2.1	160	141	124	-22.50	-12.06	124	112	111	-10.48	-0.89
Total farm area - Acres	50,799	45,982	48,070	-5.4	4.5	22,892	20,068	17,361	-24.16	-13.49	43,355	40,065	36,380	-16.09	-9.20
Area owned - Acres	41,441	38,817	38,515	-7.1	-.08	20,386	17,088	14,412	-29.30	-15.66	34,426	31,107	27,901	-18.95	-10.31
Area leased from governments - Acres	x	x	262	-	-	x	x	-	-	-	153	x	422	175.82	-
Area rented or leased from others - Acres	5,911	4,423	6,533	10.5	47.7	3,108	2,593	1,819	-41.47	-29.85	7,673	8,953	8,040	4.78	-10.20
Area crop-shared from others - Acres	x	x	510	-	-	x	-	x	-	-	x	x	-	-	-
Other areas used by the operation - Acres	3,469	x	2,862	-17.5	-	568	x	x	-	-	x	1,085	1,039	-	-4.24
Area of land used by others - Acres	967	649	612	-36.7	-5.7	1,315	725	602	-54.22	-16.97	535	1,388	1,022	91.03	-26.37

- Nil or zero
x Data suppressed due to confidentiality restrictions

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

Farm Land Use in Sudbury / West Nipissing by Acreage – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total land in crops – acres	18,411	16,363	18,502	0.5%	13.1%	8,667	8,024	7,745	-10.6	-3.5	22,343	21,866	21,660	-3.06	-0.94
Total pastureland – acres	10,782	9,531	9,492	-12.0%	-0.4%	3,337	2,684	1,849	-44.6	-31.1	NA	NA	NA	NA	NA
Woodland, wetland and other land – acres	21,606	20,088	20,076	-7.1%	-0.1%	10,888	9,360	7,767	-28.7	-17.0	NA	NA	NA	NA	NA
Total farm area – acres	50,799	45,982	48,070	-5.4%	4.5%	22,892	20,068	17,361	-24.2	-13.5	43,355	40,065	36,380	-16.09	-9.20
Percent land in crops/pasture	*57.5%*	*56.3%*	*58.2%*			*52.4%*	*53.4%*	*55.3%*			NA	NA	NA		
Percent land in woodland, wetland, other use	*42.5%*	*43.7%*	*41.8%*			*47.6%*	*46.6%*	*44.7%*			NA	NA	NA		

NA – aggregate data not available

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

Field Crop Production in Sudbury / West Nipissing by Acreage – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total farm area - Farms reporting	143	141	138	-3.5	-2.1	160	141	124	-22.5	-12.1	124	112	111	-10.5	-0.9
Total farm area - Acres	50,799	45,982	48,070	-5.4	4.5	22,892	20,068	17,361	-24.2	-13.5	43,355	40,065	36,380	-16.1	-9.2
Total land in crops - Farms reporting	124	116	123	-0.8	6.0	126	103	88	-30.2	-14.6	112	100	94	-16.1	-6.0
Total land in crops - Acres	18,411	16,363	18,502	0.5	13.1	8,667	8,024	7,745	-10.6	-3.5	22,343	21,866	21,660	-3.1	-0.9
Spring wheat (excluding durum) - Acres	x	x	148	-	-	x	x	x	-	-	x	x	x	-	-
Winter wheat - Acres	x	x	86	-	-	-	-	x	-	-	x	384	x	-	-
Oats - Acres	711	642	1,045	47.0	62.8	365	477	218	-40.3	-54.3	1,652	1,880	1,607	-2.7	-14.5
Barley - Acres	922	623	720	-21.9	15.6	190	x	45	-76.3	-	1,441	692	x	-	-
Mixed grains - Acres	237	525	x	-	-	188	-	x	-	-	166	55	284	71.1	416.4
Corn for grain - Acres	x	x	x	-	-	-	-	x	-	-	x	x	x	-	-
Corn for silage - Acres	x	x	318	-	-	-	-	-	-	-	162	x	61	-62.3	-
Rye (fall and spring) - Acres	x	-	x	-	-	110	x	x	-	-	0	-	x	-	-
Canola (rapeseed) - Acres	0	335	231	-	-31.0	x	370	x	-	-	395	1,680	2,443	518.5	45.4
Soybeans - Acres	x	483	258	-	-46.6	x	x	472	-	-	477	x	x	-	-
Flaxseed - Acres	0	-	-	-	-	-	-	-	-	-	x	x	x	-	-
Dry field peas - Acres	x	105	x	-	-	-	-	-	-	-	0	-	x	-	-
Dry white beans - Acres	0	-	-	-	-	-	-	-	-	-	x	-	x	-	-
Other dry beans - Acres	0	x	x	-	-	-	-	x	-	-	x	-	-	-	-
Alfalfa and mixtures - Acres	3,165	3,303	4,329	36.8	31.1	1,259	1,396	782	-37.9	-44.0	7,344	5,415	3,071	-58.2	-43.3
All other tame hay and fodder crops - Acres	12,563	9,796	10,631	-15.4	8.5	4,488	2,811	3,282	-26.9	16.8	8,173	7,398	7,267	-11.1	-1.8
Forage seed for seed -Acres	x	-	x	-	-	x	x	x	-	-	x	x	x	-	-
Potatoes - Acres	5	x	x	-	-	827	911	1,206	45.8	32.4	14	11	59	321.4	436.4
Sunflowers - Acres	x	-	x	-	-	-	x	x	-	-	0	-	-	-	-
Buckwheat - Acres	x	x	x	-	-	x	x	x	-	-	x	x	x	-	-
Sugar beets - Acres	0	-	-	-	-	-	x	-	-	-	0	-	x	-	-
Other field crops - Acres	0	x	-	-	-	-	-	x	-	-	x	x	-	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

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

Vegetable Production in Sudbury / West Nipissing by Acreage – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total vegetables - Farms reporting	10	9	14	40.0	55.6	10	10	19	90.0	90.0	8	6	11	37.5	83.3
Total vegetables - Acres	66	17	x	-	-	37	16	71	91.9	343.8	42	78	124	195.2	59.0
Sweet corn - Acres	10	6	6	-40.0	0.0	14	6	10	-28.6	66.7	24	42	52	116.7	23.8
Tomatoes - Acres	x	1	2	-	100.0	2	1	4	100.0	300.0	x	x	2	-	-
Cucumbers - Acres	x	x	2	-	-	2	1	4	100.0	300.0	x	1	2	-	100.0
Green peas - Acres	x	x	x	-	-	1	1	5	400.0	400.0	x	x	1	-	-
Green/wax beans - Acres	x	x	3	-	-	2	1	6	200.0	500.0	x	x	x	-	-
Cabbage - Acres	x	1	-	-	-	x	x	5	-	-	x	x	x	-	-
Chinese cabbage - Acres	0	-	x	-	-	-	-	x	-	-	0	-	x	-	-
Cauliflower - Acres	x	x	x	-	-	x	-	1	-	-	0	-	x	-	-
Broccoli - Acres	x	x	1	-	-	x	x	1	-	-	0	-	x	-	-
Brussels sprouts - Acres	0	-	1	-	-	-	-	1	-	-	0	-	x	-	-
Carrots - Acres	x	x	2	-	-	5	x	7	40.0	-	x	x	1	-	-
Rutabagas/turnips - Acres	x	x	2	-	-	-	x	3	-	-	x	x	x	-	-
Beets - Acres	x	x	1	-	-	2	1	5	150.0	400.0	x	x	1	-	-
Radishes - Acres	0	-	1	-	-	x	-	1	-	-	0	-	x	-	-
Shallots/green onions-Acres	x	-	1	-	-	x	x	2	-	-	0	-	x	-	-
Dry onions, yellow, Spanish, cooking, etc. - Acres	0	x	1	-	-	x	-	1	-	-	x	x	2	-	-
Celery - Acres	0	-	x	-	-	-	-	-	-	-	0	x	x	-	-
Lettuce - Acres	x	x	1	-	-	1	x	2	100.0	-	0	x	x	-	-
Spinach - Acres	0	x	x	-	-	x	x	-	-	-	x	-	x	-	-
Peppers - Acres	0	-	1	-	-	-	-	1	-	-	0	x	1	-	-
Pumpkins - Acres	x	1	2	-	100.0	4	1	3	-25.0	200.0	x	x	x	-	-
Squash and zucchini - Acres	x	1	4	-	300.0	1	1	4	300.0	300.0	x	x	2	-	-
Asparagus – Acres	x	-	x	-	-	-	-	x	-	-	0	x	x	-	-
Other vegetables - Acres	x	4	3	-	-25.0	x	3	5	-	66.7	x	x	18	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

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

Fruit / Berry Production in Sudbury / West Nipissing by Acreage – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total fruits, berries and nuts - Farms reporting	2	5	8	300.0	60.0	6	10	12	100.0	20.0	4	3	3	-25.0	0.0
Total fruits, berries and nuts (producing and non-producing) - Acres	x	10	x	-	-	62	66	82	32.3	24.2	91	x	x	-	-
Apples total area - Acres	0	x	x	-	-	-	-	x	-	-	x	-	x	-	-
Pears total area - Acres	0	-	-	-	-	-	-	x	-	-	x	-	-	-	-
Plums and prunes total area - Acres	0	-	-	-	-	-	-	x	-	-	0	-	-	-	-
Cherries (sweet) total area - Acres	0	-	x	-	-	-	-	x	-	-	0	-	-	-	-
Cherries (sour) total area - Acres	0	x	-	-	-	-	-	x	-	-	x	-	-	-	-
Grapes total area - Acres	0	-	-	-	-	-	x	x	-	-	0	-	-	-	-
Strawberries total area - Acres	x	x	x	-	-	48	52	34	-29.2	-34.6	x	x	x	-	-
Raspberries total area - Acres	x	x	x	-	-	x	x	10	-	-	x	x	x	-	-
Cranberries total area - Acres	0	-	-	-	-	-	-	x	-	-	0	-	-	-	-
Blueberries total area - Acres	0	-	x	-	-	-	-	x	-	-	x	-	-	-	-
Saskatoon berries total area - Acres	0	-	x	-	-	-	-	x	-	-	0	-	-	-	-
Other fruits, berries and nuts total area - Acres	0	-	x	-	-	x	-	x	-	-	0	x	x	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

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

Greenhouse, Mushroom and Other Products in Sudbury / West Nipissing – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total area of greenhouses in use - Farms reporting	6	8	8	33.3	0.0	10	4	9	-10.0	125.0	3	1	1	-66.7	0.0
Total area of greenhouses in use - Square feet	x	34,672	36,844	-	6.3	x	68,616	77,762	-	13.3	6,500	x	x	-	-
Greenhouse flowers - Farms reporting	5	6	7	40.0	16.7	8	4	7	-12.5	75.0	2	1	1	-50.0	0.0
Greenhouse flowers - Square feet	36,680	28,520	28,496	-22.3	-0.1	73,820	x	63,950	-13.4	-	x	x	x	-	-
Greenhouse vegetables - Farms reporting	3	7	5	66.7	-28.6	3	1	7	133.3	600.0	2	-	1	-50.0	-
Greenhouse vegetables - Square feet	x	6,152	5,288	-	-14.0	x	x	13,812	-	-	x	-	x	-	-
Other greenhouse products - Farms reporting	1	-	3	200.0	-	1	-	-	-100.0	-	0	-	-	-	-
Other greenhouse products - Square feet	x	-	3,060	-	-	x	-	-	-	-	0	-	-	-	-
Total area under glass, plastic or other protection - Farms reporting	6	8	8	33.3	0.0	10	4	9	-10.0	125.0	3	1	1	-66.7	0.0
Total area under glass, plastic or other protection - Square feet	x	35,272	37,808	-	7.2	182,870	68,616	77,762	-57.5	13.3	8,500	x	x	-	-
Total growing area for mushrooms - Farms reporting	0	-	-	-	-	-	-	1	-	-	0	1	-	-	-
Total growing area for mushrooms - Square feet	0	-	-	-	-	-	-	x	-	-	0	x	-	-	-
Taps on maple trees in the spring of the census year - Farms reporting	8	7	10	25.0	42.9	3	2	6	100.0	200.0	6	2	12	100.0	500.0
Taps on maple trees in the spring of the census year – Number of taps	2,953	2,563	2,176	-26.3	-15.1	852	x	3,100	263.8	-	2,949	x	12,134	311.5	-
Honeybees - Farms reporting	3	3	4	33.3	33.3	6	10	8	33.3	-20.0	2	3	8	300.0	166.7
Honeybees - Number of colonies	x	x	27	-	-	58	72	66	13.8	-8.3	x	x	126	-	-

- Nil or zero
x Data suppressed due to confidentiality restrictions

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

Livestock / Poultry Inventory for Sudbury / West Nipissing – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total cattle and calves - Number	4,570	4,353	4,916	7.6	12.9	1,077	668	538	-50.0	-19.5	3,814	2,919	2,352	-38.3	-19.4
Calves, under 1 year - Number	1,312	1,230	1,417	8.0	15.2	343	196	161	-53.1	-17.9	1,083	872	611	-43.6	-29.9
Steers, 1 year and over - Number	122	384	285	133.6	-25.8	97	35	42	-56.7	20.0	173	87	92	-46.8	5.7
Total heifers, 1 year and over - Number	684	624	923	34.9	47.9	99	126	77	-22.2	-38.9	640	448	354	-44.7	-21.0
Heifers for slaughter or feeding - Number	65	108	257	295.4	138.0	25	49	27	8.0	-44.9	125	86	63	-49.6	-26.7
Heifers for beef herd replacement - Number	216	139	313	44.9	125.2	74	77	50	-32.4	-35.1	118	97	175	48.3	80.4
Heifers for dairy herd replacement - Number	403	377	353	-12.4	-6.4	-	-	-	-	-	397	265	116	-70.8	-56.2
Total cows - Number	2,379	2,038	2,199	-7.6	7.9	501	282	236	-52.9	-16.3	1,859	1,469	1,250	-32.8	-14.9
Beef cows - Number	1,500	1,294	1,493	-0.5	15.4	501	282	236	-52.9	-16.3	1,128	916	841	-25.4	-8.2
Dairy cows - Number	879	744	706	-19.7	-5.1	-	-	-	-	-	731	553	409	-44.0	-26.0
Bulls, 1 year and over - Number	73	77	92	26.0	19.5	37	29	22	-40.5	-24.1	59	43	45	-23.7	4.7
Total sheep and lambs - Number	x	1,134	692	-	-39.0	x	-	21	-	-	339	412	1,119	230.1	171.6
Rams - Number	17	20	17	0.0	-15.0	x	-	x	-	-	10	x	18	80.0	-
Ewes - Number	x	677	379	-	-44.0	x	-	8	-	-	192	220	633	229.7	187.7
Lambs - Number	x	437	296	-	-32.3	x	-	x	-	-	137	x	468	241.6	-
Total pigs - Number	x	141	370	-	162.4	34	x	x	-	-	215	42	77	-64.2	83.3
Boars - Number	0	5	5	-	0.0	x	-	28	-	-	x	x	x	-	-
Sows and gilts for breeding - Number	x	x	46	-	-	12	-	x	-	-	37	x	x	-	-
Nursing pigs - Number	0	x	74	-	-	x	-	x	-	-	x	x	x	-	-
Weaner pigs - Number	..	x	195	-	-	..	-	x	-	-	..	x	x	-	-

*Grower and finishing pigs – Number **	x	x	50	-	-	x	x	616	-	-	x	x	x	-	-
Goats - Number	13	73	205	1476.9	180.8	20	69	328	1540.0	375.4	779	x	682	-12.5	-
Rabbits - Number	N/A	88	120	-	36.4	N/A	x	40	-	-	N/A	x	18	-	-
Bison (buffalo) - Number	63	x	x	-	-	-	-	-	-	-	0	-	-	-	-
Elk - Number	x	x	-	-	-	-	-	-	-	-	0	-	-	-	-
Deer (excluding wild deer) - Number	x	x	x	-	-	x	x	x	-	-	x	x	x	-	-
Total hens and chickens - Number	1,225	1,733	2,640	115.5	52.3	614	4,317	9,394	1430.0	117.6	757	381	1,225	61.8	221.5
Pullets under 19 weeks, intended for laying - Number	190	x	178	-6.3	-	x	x	x	-	-	0	-	39	-	-
Laying hens, 19 weeks and over - Number	857	1,016	1,445	68.6	42.2	x	x	915	-	-	232	200	522	125.0	161.0
Layer and broiler breeders (pullets and hens) - Number	N/A	x	163	-	-	N/A	-	x	-	-	N/A	-	17	-	-
Broilers, roasters and Cornish - Number	178	x	854	379.8	-	180	x	8,171	4439.4	-	525	181	647	23.2	257.5
Turkeys - Number	x	54	x	-	-	x	9	119	-	1222.2	x	19	42	-	121.1
Other poultry - Number	114	58	77	-32.5	32.8	116	136	111	-4.3	-18.4	13	x	95	630.8	-

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

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

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

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

Source: Dairy Farmers of Ontario.

Table Egg Production in Sudbury / West Nipissing – 2005, 2010, 2015

	Sudbury District					Greater Sudbury					West Nipissing				
	2005	2010	2015	% Change 2005 to 2015	% Change 2010 to 2015	2005	2010	2015	% Change 2005 to 2015	% Change 2010 to 2015	2005	2010	2015	% Change 2005 to 2015	% Change 2010 to 2015
Table egg production in the calendar year prior to the census - Dozens	N/A	x	28,683	-	-	N/A	8,413	9,928	-	18.0	N/A	x	4,757	-	-
.. Figures not available - Nil or zero															

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

Farms Direct Selling to Consumers in Sudbury / West Nipissing – 2016 *

	Sudbury District	Greater Sudbury	West Nipissing
Agricultural products directly sold to consumers for human consumption - Farms reporting	39	42	36
Agricultural products directly sold to consumers for human consumption: Unprocessed agricultural products (fruits, vegetables, meats cuts, poultry, eggs, maple syrup, honey, etc.) - Farms reporting	37	41	34
Agricultural products directly sold to consumers for human consumption: Value-added agricultural products (jellies, sausages, wine, cheese, etc.) - Farms reporting	7	3	4
Method used to sell to consumers directly for human consumption: Farm gate sales, stands, kiosks, U-pick - Farms reporting	36	39	34
Method used to sell to consumers directly for human consumption: Farmers' markets - Farms reporting	7	4	12
Method used to sell to consumers directly for human consumption: Community Supported Agriculture (CSA) - Farms reporting	3	1	3
Method used to sell to consumers directly for human consumption: Other methods - Farms reporting	4	2	1
* This data was not collected in previous Census periods			

Source: Statistics Canada, Census of Agriculture, 2016.

Farm Operators in Sudbury / West Nipissing – 2006, 2011, 2016

	Sudbury District					Greater Sudbury					West Nipissing				
	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016	2006	2011	2016	% Change 2006 to 2016	% Change 2011 to 2016
Total number of farm operators	205	205	205	0.0	0.0	245	200	175	-28.6	-12.5	190	170	170	-10.5	0.0
Gender: Male - Number of farm operators	140	145	135	-3.6	-6.9	160	130	110	-31.3	-15.4	120	110	110	-8.3	0.0
Gender: Female - Number of farm operators	65	65	70	7.7	7.7	85	65	65	-23.5	0.0	70	60	60	-14.3	0.0
Number of operators on farms with one operator	80	80	75	-6.3	-6.3	90	85	75	-16.7	-11.8	60	55	50	-16.7	-9.1
Number of operators on farms with two or more operators	125	135	130	4.0	-3.7	155	115	100	-35.5	-13.0	130	115	120	-7.7	4.3
Age: Under 35 years - Number of farm operators	15	20	15	0.0	-25.0	15	15	10	-33.3	-33.3	15	15	20	33.3	33.3
Age: 35 to 54 years - Number of farm operators	110	80	60	-45.5	-25.0	120	65	60	-50.0	-7.7	115	85	65	-43.5	-23.5
Age: 55 years and over - Number of farm operators	80	110	125	56.3	13.6	105	110	105	0.0	-4.5	60	70	90	50.0	28.6
Average age of farm operators - Years	53	55	56	6.1	1.8	53	56	57	7.0	1.8	50.1	52	54	7.8	3.8

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