Food Matters MANITOBA
Parlons alimentation

GROWING FOR THE FUTURE

Building a Local, Sustainable Food Economy in Manitoba

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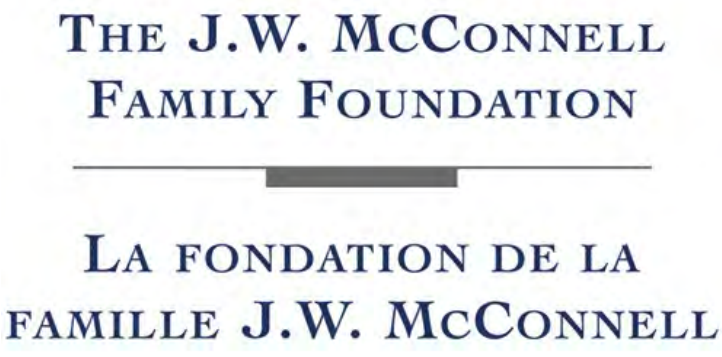


CONTENTS

TABLE OF FIGURES

INTRODUCTION

The local food economy in Manitoba is growing. Consumers are seeking out local food – whether at a farmers' market, their grocery store, or while eating out. Institutions, too, are exploring ways to fulfill environmental and social mandates through local, sustainable food procurement. Meanwhile, the Canadian Restaurant and Foodservices Association identified locally produced food and sustainable food as the top two trends in Canadian cooking.[1] Nearly everyone who participated in this project agreed that there was huge potential for Manitoba foods in our province. Yet, as it currently stands, Manitoba's local, sustainable food economy is small despite our province's vast agricultural capacity.

While there are many opportunities for growing the local, sustainable food economy in Manitoba, doing so will require overcoming many barriers. Some of these are barriers we can do little about – our low population density or relatively short growing season, for example. Other barriers, however, can be addressed through policy changes or strategic investments by governments, the private sector, or non-profit organizations.

Manitoba is an amazing place for growing and raising food, annually producing more than 2.6 billion kilograms of food including large quantities of grains, oilseeds, meat, and potatoes.[2] Our land, too, is profoundly shaped by agricultural activities as over 10.7 million acres of land is used for crop production and 4.6 million acres is used for pasture.[3] Agricultural production is also integral to our economy. Agricultural commodity exports totaled $4.3 billion in 2011, a significant contributor to Manitoba's economy.[4]

Yet, all is not well on the farm. The number of farms in Manitoba dropped by 17% between 2006 and 2011, an average loss of twelve farms per week over the five year period. As the number of farms falls, the farmers' share of the food dollar remains low, ranging from four cents per dollar for grain products to 51 cents per dollar for dairy products.[5] One example of this is the market reaction to BSE nearly a decade ago. As the price farmers received for cattle plunged, the amount consumers paid for beef products remained essentially

unchanged. The beef industry may be a dramatic example, but similar stories can be told in other sectors where large profits are made by companies in the middle of the food production and distribution chain while the farmer's share of the food dollar shrinks. In recent years, some farm sectors have done very well, particularly grains and oilseeds, but increases in income have been accompanied by increasing input prices (see Figure 11).

Local, Sustainable Food

Local food will not solve all of the challenges facing Manitoba's agricultural sector and, given our agricultural capacity and the population of our province, we will never be able to consume all the food our province produces. Nevertheless, a strong local food system holds the promise of economic benefits and strengthened communities. Investing in local food economies can provide farmers with new revenue sources and new ways to market their products. The premiums received for local products can also help farmers mediate some of the whims of global commodity markets. There is potential in a local food system for farmers to shift from being forced to take prices on global commodity markets to being price setters, able to match the price of what they sell to their costs of production and labour inputs. In turn, the local food economy can create jobs. One study indicates that for every thousand cattle processed at small-scale meat processing facilities, 7.4 jobs are directly or indirectly created.[6] In short, according to economist Ken Meter, local food "can play a crucial role in building health, wealth, connection, and capacity for residents of Manitoba communities."[7]

And why then "local, sustainable" rather than simply local? While local food is good for the economy, local, sustainable food is good for both the economy and the environment. Sustainable agriculture can contribute to animal well-being, enrich soils and reduce erosion, support natural habitat coexistence with agriculture, and reduce runoff into lakes, streams, and rivers. Furthermore, sustainable food production can be an important part of broader societal environmental goals and supporting the local, sustainable food sector will benefit not only the economy but our common ecological objectives.

Some critics of local, sustainable food systems have described them as nostalgic, utopian, or even harmful to farmers who sell primarily to the export market. A local food economy, however, is rooted neither in economic protectionism nor a nostalgic vision for what once

was. Rather, it offers the promise of economic benefits for Manitoba producers and processors. A local, sustainable food economy will improve our ability to withstand external threats such as border closures, diversify our production and processing sectors, and create jobs. It can bring communities together, building relationships between farmers and consumers. And it can contribute to a vibrant ecological landscape that supports a healthy environment. In these ways, developing a local, sustainable food economy is an opportunity to strengthen and diversify our agri-food sector for the future, not to re-create a utopian version of the past.

Report Outline

This document has three main sections. The first is to paint a picture of the existing local, sustainable food economy and situate that economy within the broader agricultural sector and within broader consumer trends in Manitoba. In doing so, it both acknowledges the small size of the existing local, sustainable food economy, while demonstrating the potential for growth of this sector.

Based on interviews with participants in the local, sustainable food economy, nine key challenges are then identified in the second main section of this report. This highlights these challenges and how they affect the local food economy, combining data and feedback from interviews with additional research. These challenges cover a diversity of topics, from education to policy, infrastructure to labour.

The final section of this report highlights solutions identified by interview participants. These solutions are ways to address current gaps in the local, sustainable food economy, and provide a short-term and long-term roadmap for building a strong, vibrant local, sustainable food economy. These solutions are not necessarily comprehensive, but they are reflective of the opinions and ideas expressed by project participants.

Methodology

This project involved interviews with approximately forty Manitoba producers and processors, chefs, institutions, and distributors. A survey conducted with local, sustainable farmers in Manitoba (2011-2012), research conducted as part of Food Matters Manitoba's Farm to Cafeteria program including interviews with several Manitoba schools (10), and focus group data from a Farm to Fork forum were also incorporated. In addition to this, the project incorporated data from local, provincial, and federal government sources to quantify the size of the local, sustainable food economy. Finally, the report draws on other research conducted in similar jurisdictions to analyze the feasibility of solutions in the food economy.

For the purpose of this report, "local food" will be defined as food grown, raised or harvested in Manitoba, or food that has been processed in Manitoba from Manitoba produced ingredients. "Sustainable food" is perhaps harder to define. A sustainable/conventional dichotomy can unnecessarily dismiss the ecological practices of many of Manitoba's farmers. Often small-scale agriculture has been used as a shorthand for sustainability but small does not necessarily mean sustainable and large farms are not necessarily unsustainable. For the purpose of this project, sustainability includes certified and transitional organic products, Local Food Plus (LFP) certified products, and farms that follow practices similar to organic or LFP-certified products but which are not certified themselves. While this category is admittedly somewhat vague, many participants in the local, sustainable food economy are using sustainable practices but are not certified. Some do not see the cost of certification as worthwhile for the size of their operation. Others have direct relationships with purchasers, who trust their practices without third-party verification. Consequently, this report includes the perspectives of both certified and non-certified farmers and processors.

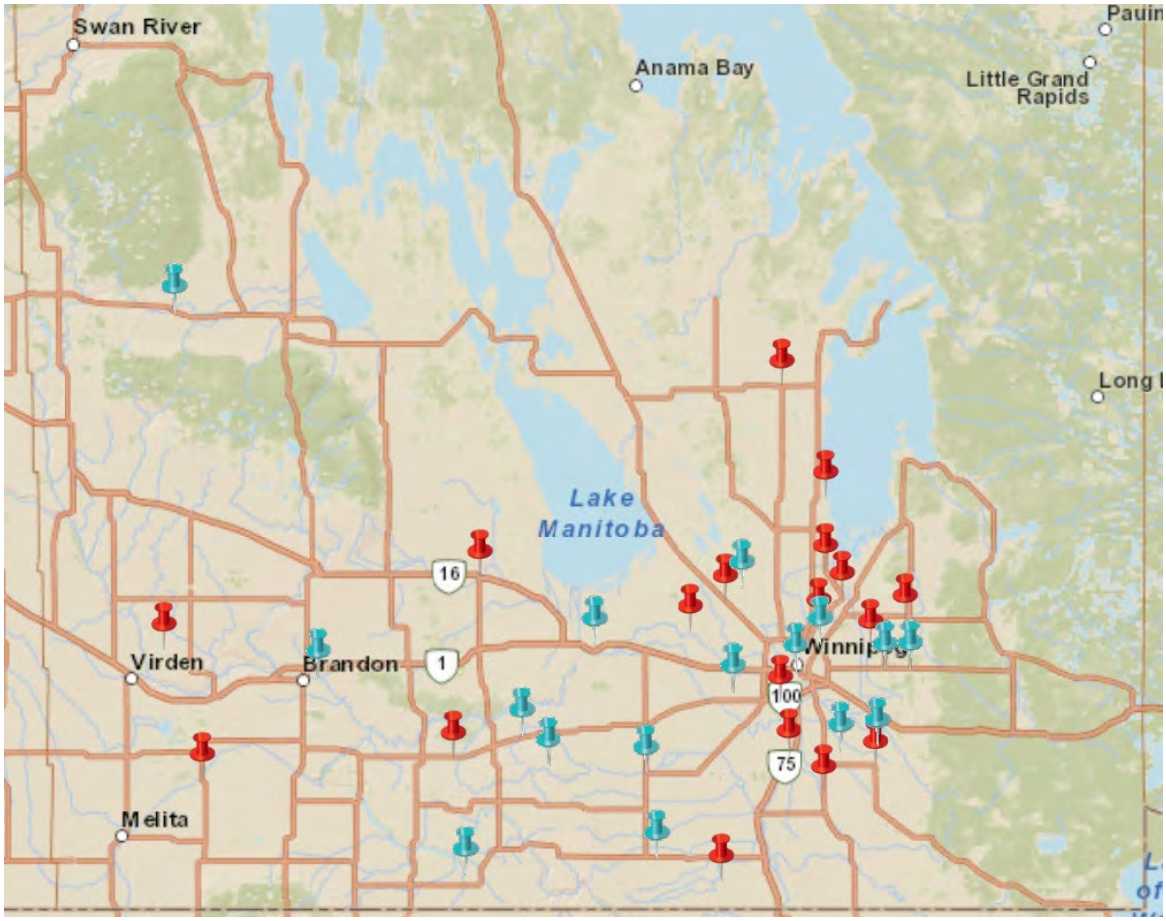


Figure 1 - Blue pins indicate towns with interview participants. Red pins indicate towns with survey participants. If a town has both survey and interview participants it is represented solely by a blue pin. Several communities had multiple participants, but are only represented by a single pin.

Reflecting Diversity

Manitoba's agricultural sector is diverse. Even those who are part of the local, sustainable food economy practice different farm management techniques, have different perspectives on agricultural politics, and see different opportunities for new products. Some see niche market opportunities, while others sell food locally to escape the market. Some producers want to sell directly and would prefer to stay a small operation while others are looking for opportunities to expand their market locally. Many of the farmers growing or producing for the local, sustainable food economy are doing so on a small scale, so at times this report will highlight needs particularly expressed by smaller operations. Yet, it is important to recognize that the local, sustainable food economy is happening on many scales, from farms of a single acre to farms of thousands of acres. Geography can also shape perspectives. A farmer near Russell will have a far different perspective on local food than a farmer on the outskirts of Winnipeg.

This report cannot possibly capture the level of diversity which is seen in Manitoba's local, sustainable food economy. Nevertheless, the themes that it highlights were held in common by many of the participants in the interviews. By bringing together new data and identifying key findings from existing research, this report will highlight the barriers that limit and the opportunities that exist for Manitoba's local food economy.

THE MANITOBAN CONTEXT

Opportunities for a local, sustainable food economy in Manitoba are shaped by several geographic and demographic factors. Manitoba is a large province, stretching nearly 500 km from east to west and several times that from north to south. Yet the province is only home to 1.2 million people, of which 60% live in the Winnipeg Census Metropolitan Area (730,018 people). Brandon (53,229) is the second largest city, followed by Steinbach (13,524) in a distant third. Consequently, some participants in this project doubted that Manitoba's population can support a large local, sustainable food economy. By comparison, Ontario's Golden Horseshoe alone provides a market of nearly 8.8 million people, nearly eight times the entire Manitoba market.

Figure 2 - Map of Manitoba

Manitoba is also unique because the population is so concentrated in a single large marketplace. While there are farmers' markets and small scale local food distribution in rural and small urban communities, most local food marketing is focused in Winnipeg. This unique situation means that farmers and processors often have to travel great distances to sell their products, reducing competitiveness and sustainability. Distance also limits the potential for farmers further away from Winnipeg to participate in the local, sustainable food economy because it is not economically feasible to direct market so far from the farm.

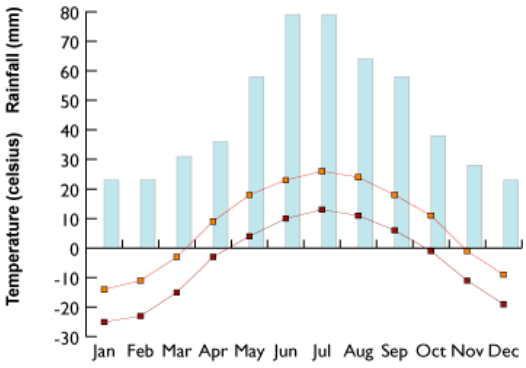


Figure 3 - Climate in Winnipeg

Climactic conditions also shape Manitoba's potential for a local, sustainable food economy. In many ways, Manitoba has favourable growing conditions for agricultural production, including good soil conditions, an abundant supply of fresh water, and long summer days. Manitoba has demonstrated an ability to produce large amounts of grain and oilseed crops, potatoes, sunflowers, and vegetables. Additionally, access to grasslands, its central location in North America, and access to freshwater have made Manitoba a major

livestock producer. Nevertheless, Manitoba's growing season is relatively short and our long, cold winters make many kinds of agricultural production difficult, if not impossible, for much of the year. Winnipeg, for example, has only 119 frost-free days per year, compared with 221 in Vancouver or 149 in Toronto.[8] However, much of what is produced in Manitoba stores well (i.e. grains, root vegetables, and meat products) which does make local foods available through much of the year.

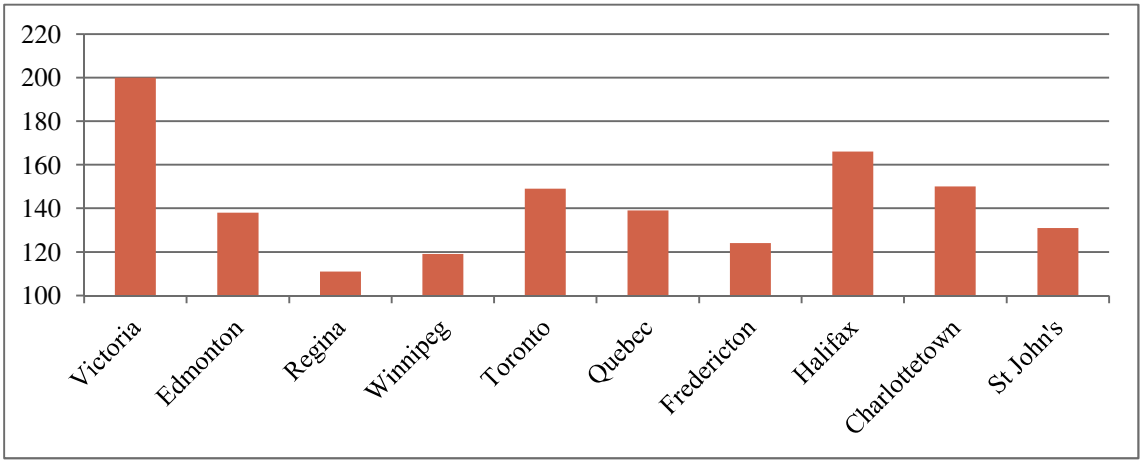


Figure 4 - Frost Free Days in Canadian Provincial Capitals

Opportunities for Manitoba's local, sustainable food economy have also been shaped by a century and a half of agricultural policy that has emphasized export-oriented agriculture. The result is infrastructure designed primarily for export, with minimal local processing and local distribution networks. For example, there are many grain elevators in Manitoba to consolidate grain for export, but only three flour mills remain.[9] Manitoba farms are on average quite large (1,135 acres)[10] compared to farms in eastern Canada (244 acres in Ontario) because of the types of crops that are grown and the availability of land.[11] While large farms enable Manitoba farmers to efficiently sell to global markets, they may be difficult to adapt to selling to local, sustainable markets, particularly when the market for local, sustainable products is relatively small and would only require a handful of large farms to fill.

FARMERS

FARMER DEMOGRAPHICS IN MANITOBA

In 2011, there were 22,315 farmers in Manitoba on 15,877 farms. Approximately 40% of farms produce grains and oilseeds and 28% of farms raise cattle. Conversely, 1% of farms produce vegetables and 0.5% of farms produce fruits or tree nuts.

Sector	Farms	Change (2006-2011)
Oilseeds/grains	6618	-2%
Cattle	4485	-36%
Hogs/pigs	318	-59%
Poultry	253	-6%
Sheep/goats	196	-2%
Vegetables/melons	189	-24%
Fruit/tree nuts	94	-24%

Figure 5 - Farms by Sector in Manitoba (2011)

In recent years, many farms have been very profitable due to high commodity prices. Grain and oilseed producers, after tough years in the mid-2000s, have had a few successive years with good returns. While input costs have offset revenue increases somewhat, farm income has increased substantially in these sectors (Figure 11). Supply managed sectors such as dairy and poultry have also experienced steady market income growth throughout the last decade. Not surprisingly, these sectors have also experienced relative stability in terms of the number of farms over the past five years (Figure 5).

While there have been good years for some farmers, many continue to struggle. Livestock industries, in particular, have faced significant challenges. The net market income for hog and pig farmers in Manitoba plunged to -$206,953 in 2008. While it has improved since then, these farmers still experienced net market losses in 2009 and 2010. Beef farmers in Manitoba, meanwhile, have had only one year since 2002 where they did not record a net market loss.[12] These market challenges are reflected in the large number of farms leaving both of these sectors (Figure 5). Furthermore, in 2012, just as the livestock industry was approaching profitability, it was hit by skyrocketing feed prices.[13]

The result is that the number of farmers in Manitoba continues to decline, dropping 16% since 2006. Only five of Manitoba's 123 rural municipalities listed in the 2011 Agricultural Census experienced a growth in their farmer population, while some saw farmer numbers decline by over 40%. This trend was particularly evident amongst farmers under the age of 35. In 2011 there were 31% fewer farmers under the age of 35 than there were five years earlier. The result is that rural communities are aging, and are struggling with how engage a new generation in farming.

Manitoba farms are growing in size. While the number of farms has declined, the number of farms over 3,520 acres has risen by 12% since 2006. The number of farms under 69 acres, meanwhile, has dropped by 19% during the same period. Long term trends in Manitoba demonstrate how farms have become larger. The number of farms between 400 and 1,119 acres has fallen from over 14,000 in 1976 to just over 4,000 in 2011. During the same period, the number of farms larger than 2,240 acres has nearly quadrupled (see Figure 6) making it the only size of farm to have experienced increased numbers during the past 35 years. Large farms have become increasingly common, driven by the economies of scale required to be profitable in global commodity markets.

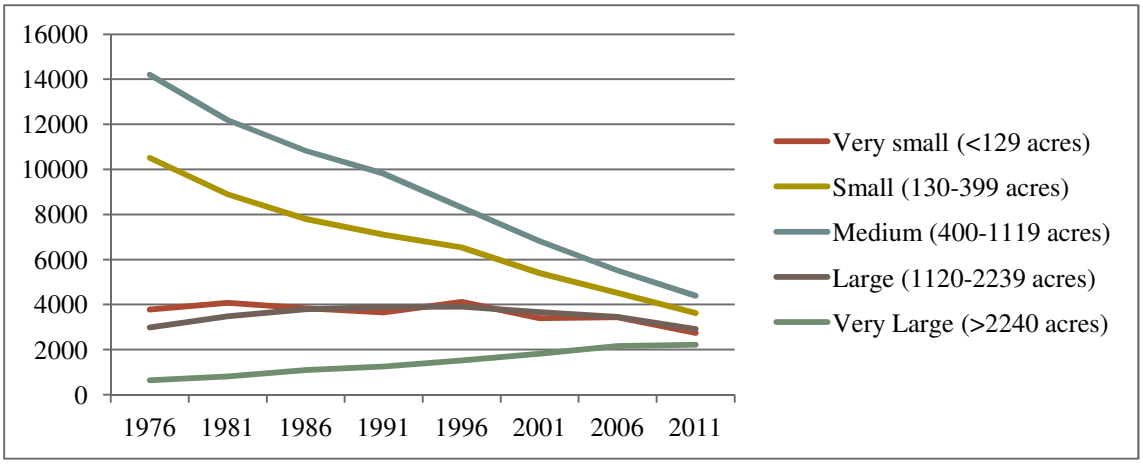


Figure 6 - Number of farms in Manitoba, per year, per farm size

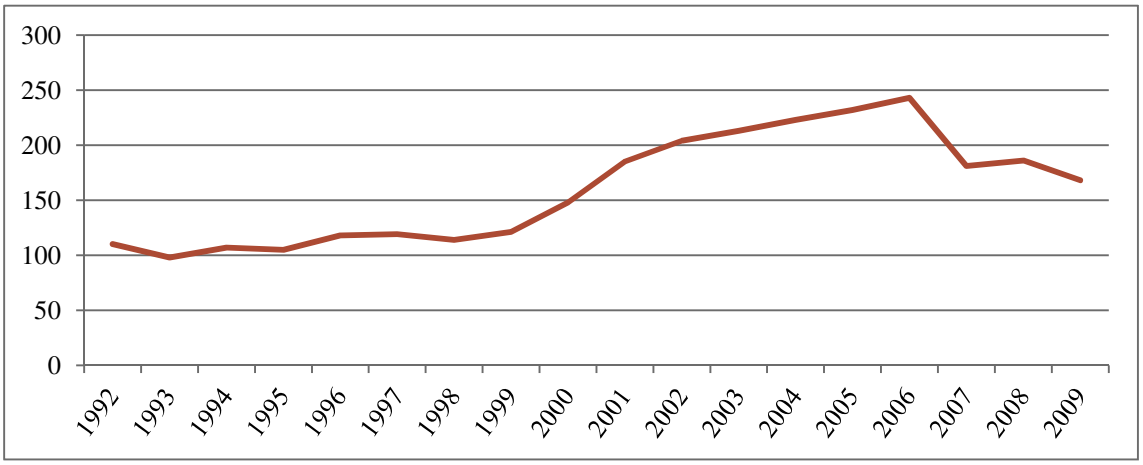


Figure 7 - Organic farms in Manitoba (based on Canadian Organic Growers statistics)

The number of certified organic farms has fallen significantly in Manitoba in the past few years (Figure 7).[14] This is in large part due to affects of the recession, which meant that US and European buyers could no longer afford high organic premiums for wheat. Of the 126 certified organic primary producers in Manitoba most grow grains and oilseeds (80) and

forage crops (51).* Organic grains and oilseeds in particular are grown almost exclusively for export markets. By comparison, there are only eight certified organic vegetable farms and five fruit farms. It is not clear how many of these farms are producing for local markets, but most of these are quite small. There are only two large organic vegetable producers in Manitoba. Additionally, there are only seven farmers that have become Local Food Plus (LFP) certified since its introduction to Manitoba in 2011. These numbers do not include non-certified farms which may follow organic or other sustainable practices, although it is difficult to determine how many of these farms exist.

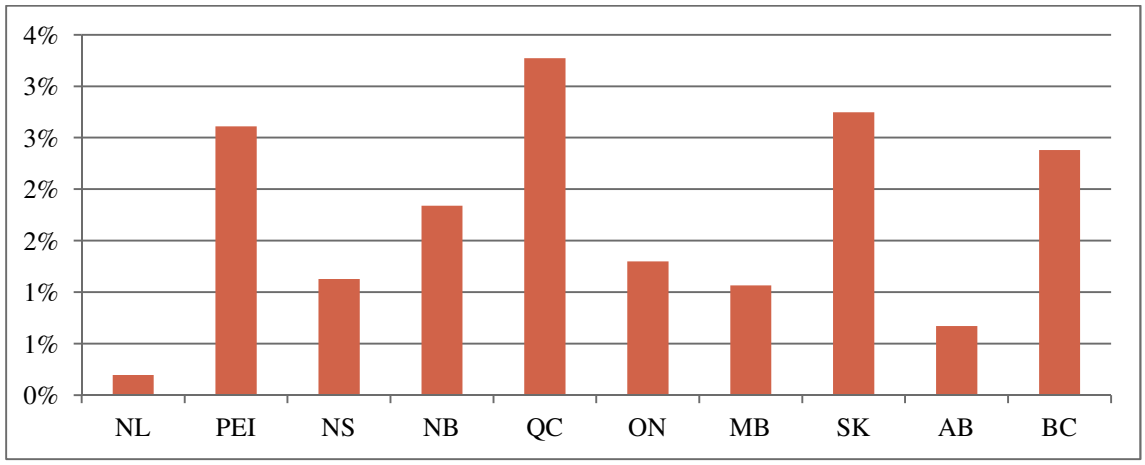


Figure 8 - Certified Organic Farms as a Percentage of Total Farms, By Province

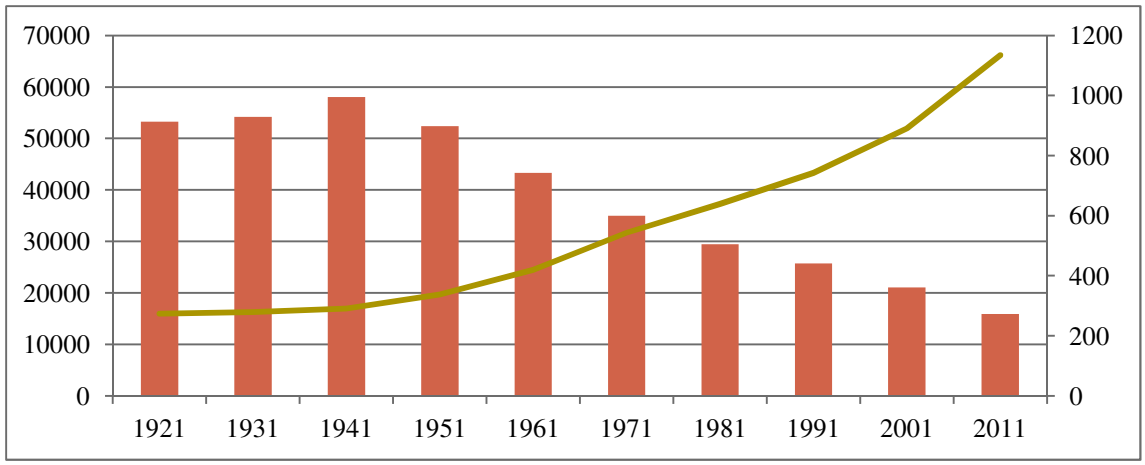


Figure 9 - Number of Farms in Manitoba (bar) and Average Size of Manitoba Farms (line)

* Numbers exceed 126 since farms are often certified for multiple crops.

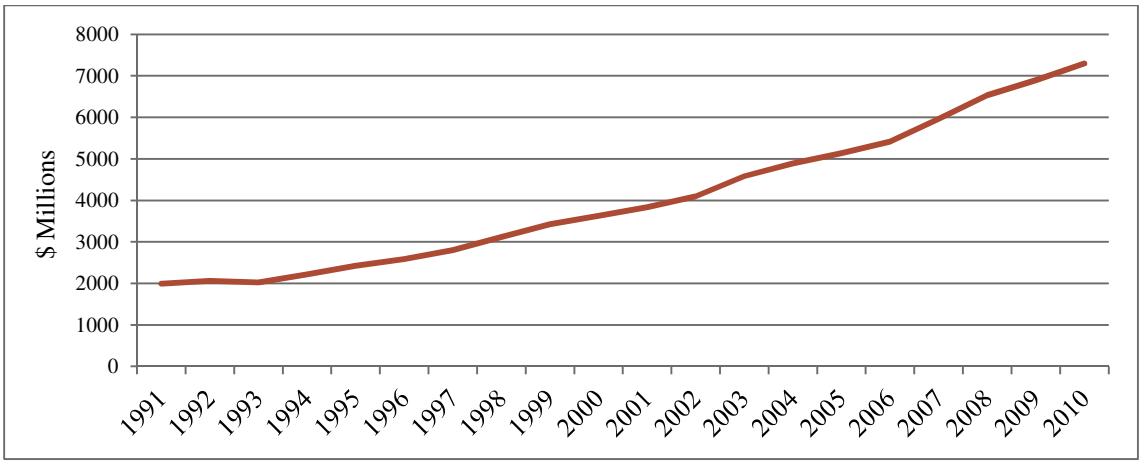


Figure 10 - Farm debt in Manitoba

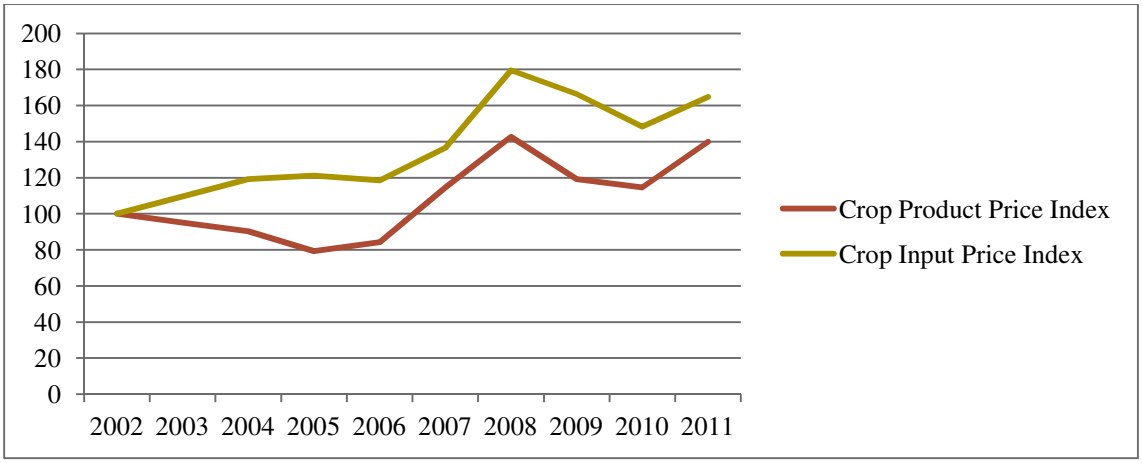


Figure 11 - Crop product price and input price indices (2002=100; CANSIM Table 328-0015 and 002-0022)

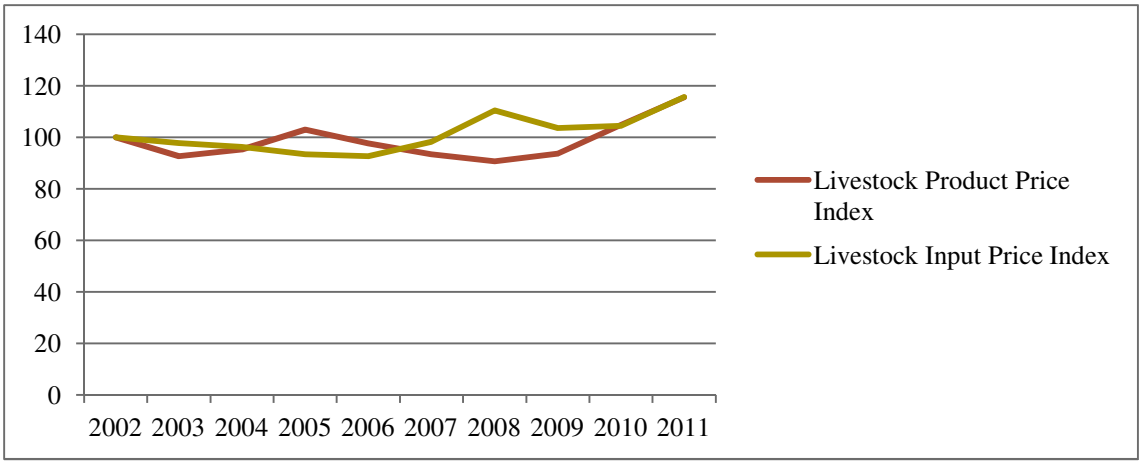


Figure 12 - Livestock product and input price indices (2002=100; CANSIM Table 328-0015 and 002-0022)

FOOD PRODUCTION BY SECTOR

LIVESTOCK

Cattle: As of 2010, there was approximately one cow per person in Manitoba, with a beef cattle population of 1,268,900. This represented a decline of 23% since 2005, likely in response to low returns for beef farmers. While Manitoba still has a substantial cattle population, only 6% of cattle were processed in Manitoba, while most were shipped to the US or Alberta. Of the 54 million pounds of beef sold in Manitoba, only 6 million pounds of beef from Manitoba was sold in Manitoba (Figure 13).[15]

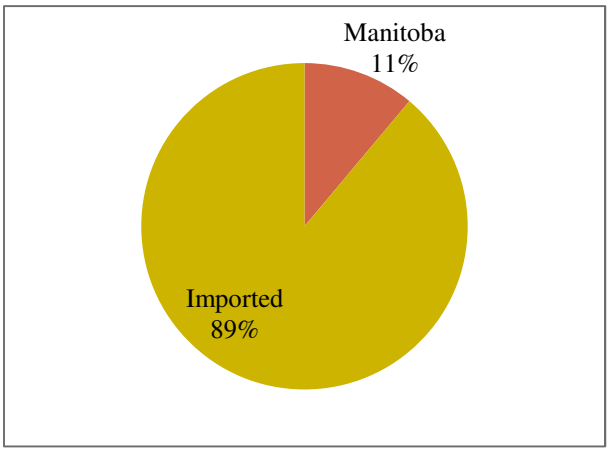


Figure 13 - Source of retail beef in Manitoba

Total inspected cattle slaughter (including federally inspected slaughter) in Manitoba is now a fraction of what it was in the 1960s and 1970s, when over 500,000 animals were slaughtered annually (Figure 14).[16] Since then, five major cattle slaughtering facilities have closed.[17] No federally inspected beef facilities remain in Manitoba. Meanwhile, provincially inspected slaughter also fell gradually until the early 2000s, before rising quickly after the discovery of BSE closed borders to Canadian beef. Since 2003-2004, provincially inspected beef slaughter has fallen again, although it has remained higher than pre-BSE levels, perhaps because farmers began selling more beef locally as they adapted to a BSE-impacted sector.[18] While it is possible to identify how many cows are slaughtered in provincially-inspected facilities, the scale of local, sustainable beef production in Manitoba is unclear.

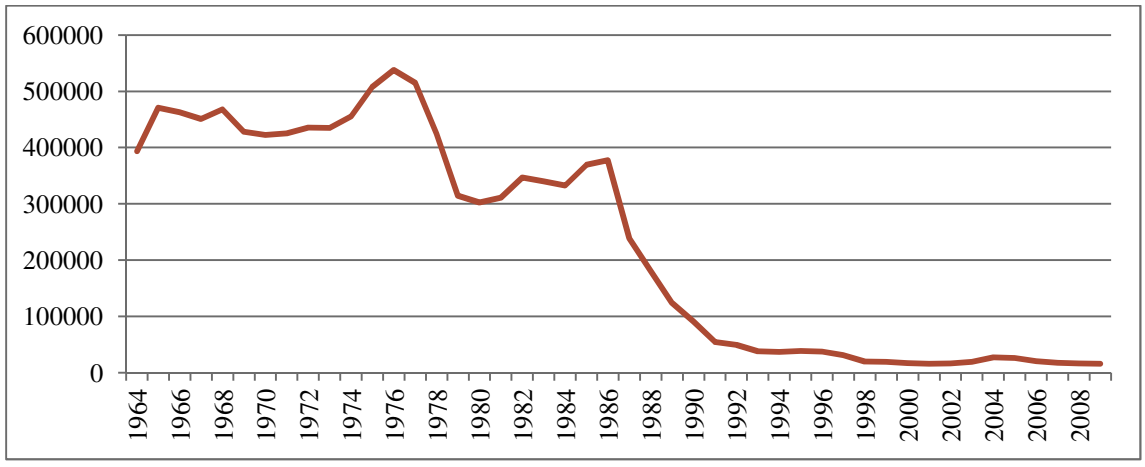


Figure 14 - Total Cattle Slaughter (federal and provincially inspected) in Manitoba, 1964-2009

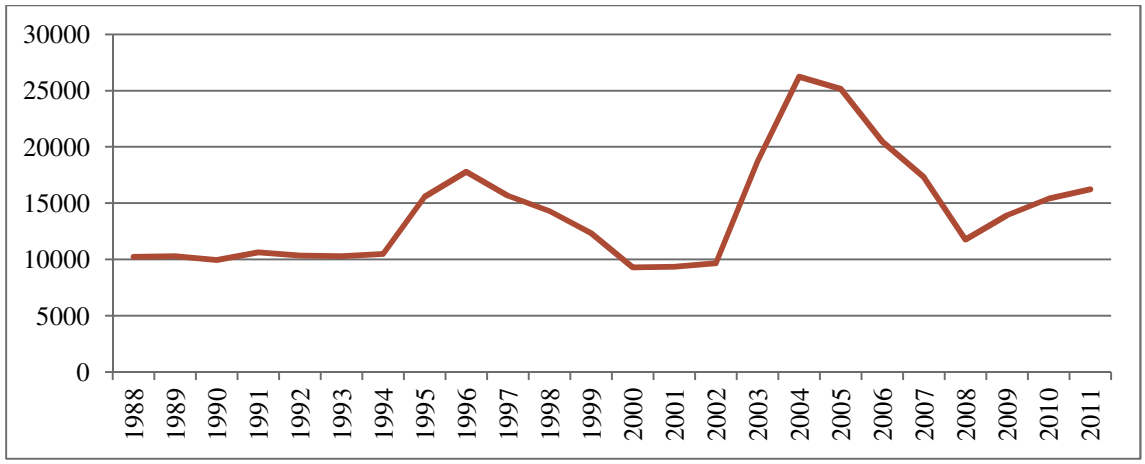


Figure 15 - Provincially Inspected Cattle Slaughter in Manitoba, 1988-2011

Dairy Production: In 2010, Manitoba had 355 dairy farms, which were home to 46,000 dairy cattle. While the number of dairy farms is down by 36% since 2003, Manitoba's dairy herd has actually grown by 14% during that period. In 2010, Manitoba dairy producers sold 124,300 kl of milk for fluid use and 186,300 kl of milk for industrial uses. Dairy products produced included 11,000 tonnes of specialty cheese, cream (3.8 Ml), butter, ice cream, and frozen yogurt. Only $12.5 million of dairy products were imported to Manitoba, compared with farm cash receipts of $228 million for dairy farmers.[19]

Manitoba has three fluid milk plants, seven industrial plants, two repackaging plants and two licensed research facilities for dairy products. This has remained steady for the past decade (13 to 14 federally registered dairy establishments per year, and one to four provincially licensed dairy establishments). Three of these facilities are owned by Manitoba businesses, including Bothwell Cheese Inc, a Cistercian Abbey, and Medallion Milk (which produces powdered milk products). Bothwell Cheese is the largest producer of artisanal cheese in Canada and has a strong presence in the local market. The remaining milk, cheese, and other processing plants are owned by corporations based outside Manitoba, including Saputo, Lucerne, and Dairyworld.

Manitoba's five organic dairies produced 20,031 hectolitres of milk in 2010-2011, representing 2.2% of

Fluid Milk:

Lucerne Foods	Winnipeg
Parmalat Dairy and Bakery	Winnipeg
Dairyworld Foods	Brandon

Cheese:

Bothwell Cheese Inc	New Bothwell
Parmalat Canada	Grunthal
Saputo Dairy Products	Winkler
Cistercian Abbey	Holland

Ice Cream:

Lucerne Foods	Winnipeg

Creameries:

Notre Dame Creamery	Notre Dame
Parmalat	St Claude

Canada's organic milk.[20] Organic milk production in Manitoba began in 2008-2009 with the production of 2,099 hl of milk. As identified in Challenge 8, the consumer market for Manitoba organic milk has not kept up with the supply.

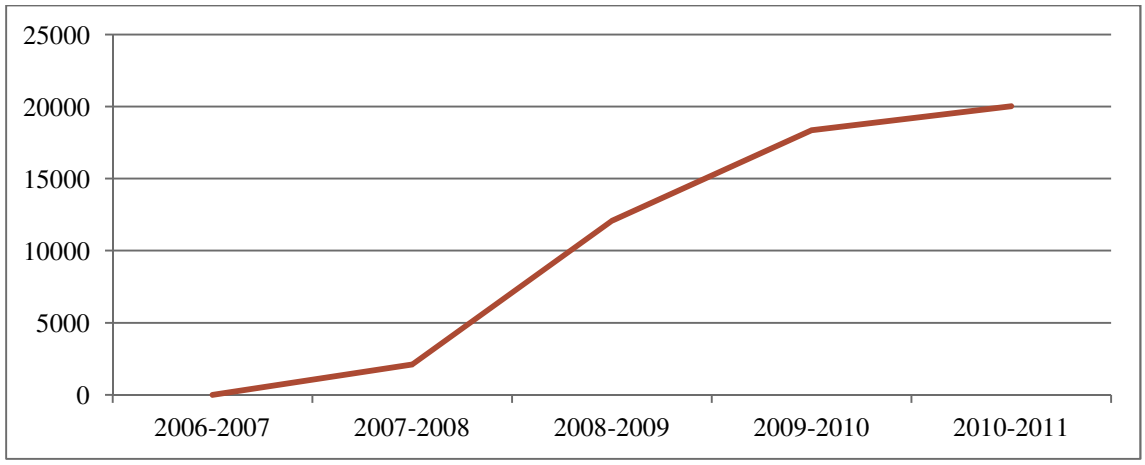


Figure 16 - Organic Milk Production in Manitoba (hl), 2006-2011

Pork: Manitoba is home to a large pork industry (there are 8 million pigs produced annually by Manitoba farmers) and is home to one-quarter of Canada's pork slaughter. There were 5.4 million pigs slaughtered in Manitoba in 2010, of which 4.17 million were of Manitoba origin. Manitobans only consume 4-5% of the total pork production (retail weight) of slaughter plants in Manitoba, while the rest is exported to Canadian and international markets.

The pork processing industry is centered in large-scale slaughter and processing facilities. The Maple Leaf Pork plant in Brandon, for example, can produce 4.5 million hogs annually and the Hy-Tek plant in Neepawa has a slaughter capacity of 1.4 million head. This industry has become increasingly concentrated. In 2002, there were six federally inspected pork processing plants in Manitoba. Since then, that number has dropped to three, while the average size of these operations has nearly tripled.[21] Even though provincially inspected slaughter capacity has grown in the same period, its percentage of the total hog slaughter has declined due to the more rapid growth of these two large operations (Figure 17).

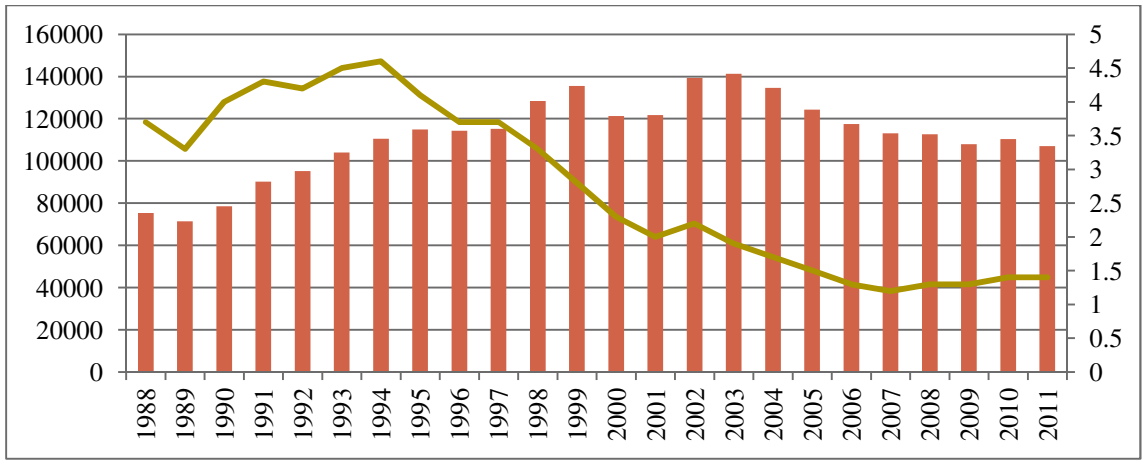


Figure 17 - Provincially Inspected Hog Slaughter in Manitoba (bar graph, left) and as a percentage of total hog production in Manitoba (line graph, right), 1988-2011.

While Manitoba has a very large pork industry, the local, sustainable pork industry is substantially smaller. Of the 8 million pigs produced in Manitoba in 2011, 107,010 pigs were slaughtered in provincially inspected plants and 2,000 were locally or farm slaughtered.[22] This accounts for just over 1% of Manitoba's pork production. Provincially-inspected pork slaughter grew throughout the 1990s, at a time when Manitoba's pork industry grew substantially (while the hog industry grew by 12.6% per year between 1995 and 2004,[23] the provincially inspected hog slaughter only increased by 1.8%). Provincially-inspected slaughter in 2011 was the lowest since 1993.[24]

However, provincial inspection only indicates that the processing was done outside of the major federally licensed facilities and is not indicative of environmental sustainability. The size of the local, sustainable pork market in Manitoba is unclear.

Poultry: Due to the supply-managed nature of the egg and poultry industry, there are relatively few imports or exports of broilers, turkeys, or eggs. For example, exports accounted for only 6% of Manitoba's processed chicken. Therefore, supply managed sectors are, by their nature, mostly local. In 2010, Manitoba produced 29.5 million registered chickens. Registered chicken producers follow animal care standards developed by the Chicken Farmers of Canada for feed, water, stocking density, catching and loading, etc.[25] There are two major chicken plants in Manitoba, Dunn Rite Food Products and Granny's Poultry Co-operative.

While there are 118 registered broiler chicken producers in Manitoba there are 500 other farms that had chickens, mostly for on-farm consumption or small-scale direct marketing.[26]

In 2010, an estimated 80,000 "non-registered" chickens, produced outside of quota (through small flock exemptions) were produced in Manitoba for sale or home consumption. Most of these were roasters (over 2.6 kg live weight) and were slaughtered on a custom-kill basis.

The turkey industry produced 1.49 million birds in 2010. There were 51 registered commercial turkey producers and over 100 non-registered producers. Non-registered turkey producers are allowed to produce up to 99 birds without quota. Even if all non-registered turkey producers produced the maximum allowable number of birds, the non-registered turkey sector would have produced 0.6% of Manitoba's turkey production.

Eggs: Manitoba's 2.9 million hens produced 70.1 million dozen eggs in 2010, of which 57.3 million dozen were sold for the table egg market. Interestingly, 80% of this production occurs within 100 kilometres of Winnipeg, primarily in southeastern Manitoba.[27]

There is a single certified organic barn-based egg producer in Manitoba with approximately 15,000 layers. Some of this production is sold outside Manitoba. Interestingly, the consumer demand for free range eggs has increased significantly in Manitoba. In 2012, 16% of consumers said that they purchase free range eggs, up from 3% a decade earlier.[28]

Other Livestock: Manitoba is home to several other smaller livestock industries as well. For example, in the summer of 2011, Manitoba was home to 70,000 sheep. In 2010, 45,200 lambs/sheep were slaughtered, of which 23,800 were slaughtered in Manitoba. Of these, 9,800 were slaughtered at an inspected facility, while 12,500 were sold live from the farm to consumers, and were likely slaughtered outside the inspected system.[29] Un-inspected slaughter usually occurs in ethnic, religious, and other specialty markets, particularly for halal slaughter or for traditional lamb products such as brains or stomachs. Meanwhile, over 70% of Manitoba's lamb supply is imported from other countries due to low prices and year-round supply.[30]

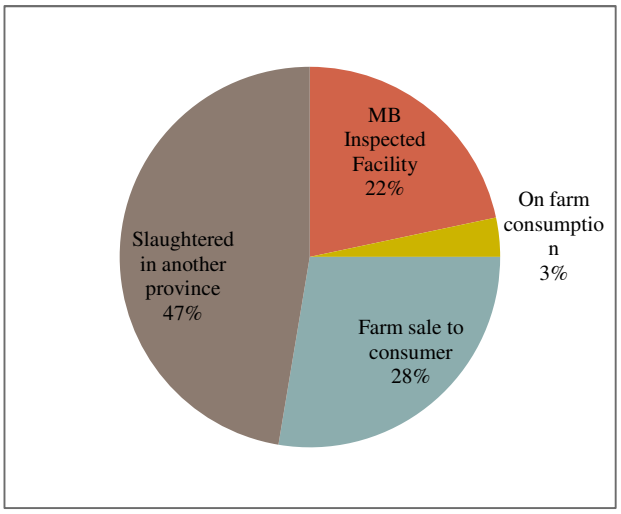


Figure 18 - Slaughter site of Manitoba lamb and sheep (2010)

Other smaller livestock industries in Manitoba include bison (19,609 animals), goats (13,159), boar (2,514), deer (716), elk (2,154), rabbit (9,891), ducks (10,439), and geese (44,846).[31] Some of these industries have experienced popularity in the export market (i.e. bison), although much of the production in these smaller livestock industries is likely for local consumption.

Manitoba is also home to a honey industry. In 2009 there were 474 beekeepers, of which 140 were commercial size (100 or more colonies), representing 70,746 colonies of bees in

Manitoba. Nearly 6,000 tonnes of honey were produced worth nearly $20 million.[32] Although Manitoba honey is commonly available for sale in Manitoba, approximately 80% of Manitoba's honey production is exported.[33]

CROPS

Grains and Oilseeds: Grains and oilseeds are Manitoba's most common crops, including wheat, barley, oats, canola, grain corn, rye, flaxseed, and sunflowers. These were grown on 6.665 million acres of land. Canola (2.725 million acres) and wheat (2.17 million acres) were the most commonly grown crops. These crops are primarily grown for export. Over 80% of wheat and more than half of oats are exported. Total bulk exports in 2011 totaled $2.1 billion while an additional $587 million of processed grain and oilseeds products were exported.[34]

Manitoba does have 80 producers of organic grains and oilseeds mostly producing for export markets. There are two certified organic operators with mills that are selling local grains. Anecdotally, it was indicated that there are two or three conventional producers doing the same, likely filling the current demand for local grains. Given the small size of the market and the scale of grains and oilseeds operations, Manitoba can support very few grain farms producing for the local market.

Similar to the meat industry, the grain industry has experienced significant industry concentration. An example of this is primary grain collection elevators. Whereas every Manitoba town once had one or more elevators, there are approximately 10% of the primary elevators that there were forty years ago. During that time total storage capacity has changed little because the average elevator capacity has increased from 2,000 tonnes to 13,800 tonnes.[35]

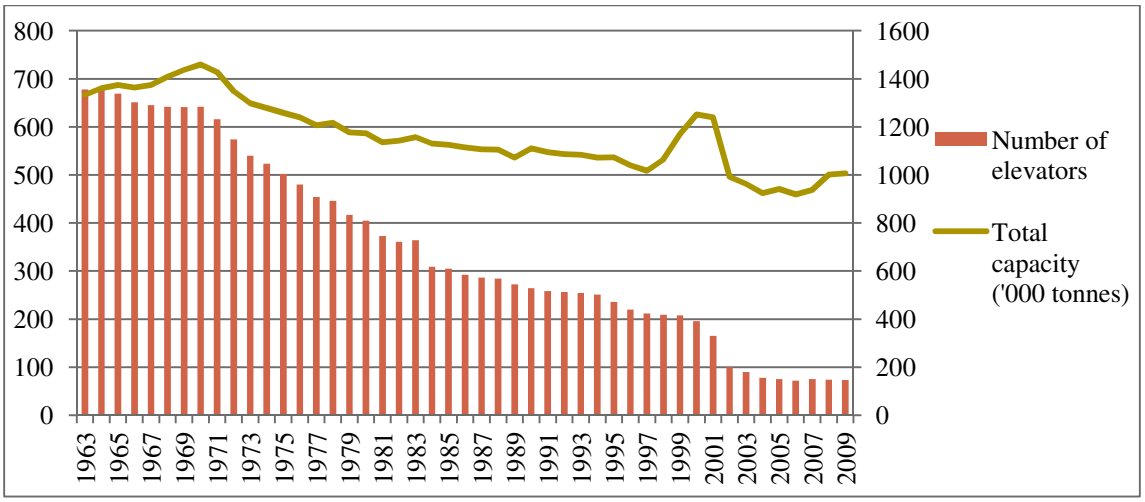


Figure 19 - Number of elevators in Manitoba and total elevator capacity, 1963-2009

Pulse and Specialty Crops: In 2011, 134,000 acres were seeded with pulse crops including buckwheat, canary seed, dry beans, dry peas, faba beans, lentils, and mustard seed. This produced farm receipts totaling $51 million. There are eleven organic pulse producers in Manitoba, although this is primarily for the export market. Large export markets for Manitoba products include soybeans to the United States, beans to Angola, the US, UK, and Mexico, and peas to China, Brazil, India, and Venezuela.[36] There is no data regarding local, sustainable pulse and specialty crop production, although most pulse production is exported as the domestic pulse and specialty crop market is small.[37]

Wild rice is another crop harvested in Manitoba, including by three certified organic wild rice harvesting companies. Manitoba's wild rice is almost exclusively harvested from lakes and rivers, particularly east of Lake Winnipeg and in northwest Manitoba near The Pas and Flin Flon. Manitoba produces approximately a quarter of Canada's wild rice production and was worth $714,000 in 2008.[38]

Vegetables: Manitoba includes large scale vegetable production for processing and export markets as well as small scale production intended for local markets. Over 85% of Manitoba's potato production, for example, is used for processed foods by companies including McCain Foods, Simplot, and Old Dutch Foods. This has made Manitoba a major exporter of potato products such as potato chips and French fries. Potato production totaled $170.8 million in 2011.[39]

Peak of the Market includes 40 Manitoba vegetable farms marketing over 120 different types of vegetable varieties. Peak of the Market products are sold in Manitoba and throughout Canada as well as exported to the United States and other destinations around the

world.[40] All producers growing more than five acres of root vegetables sell their product through Peak of the Market, which acts as a marketing board for Manitoba vegetables.[41]

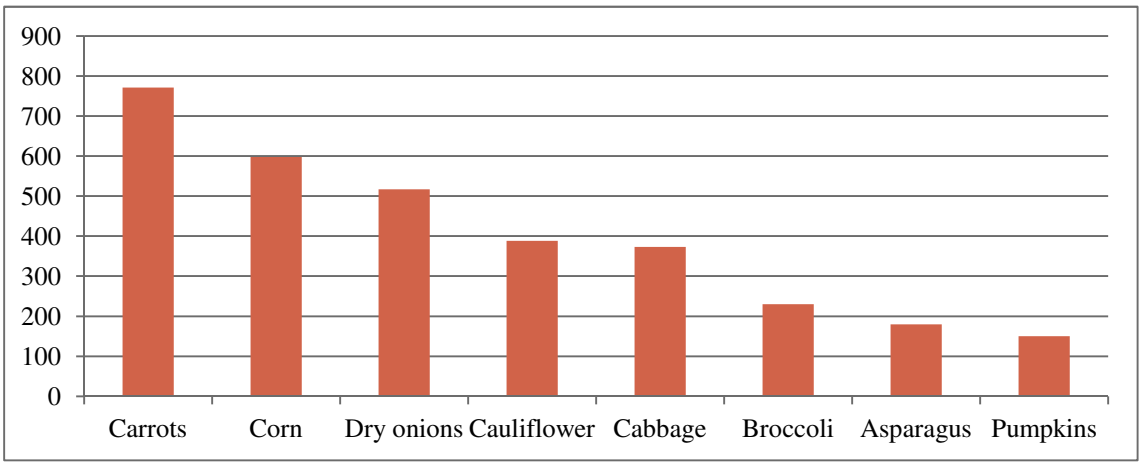


Figure 20 - Area harvested (acres) by vegetable type in Manitoba, 2011

Compared with grains and oilseeds or pulse crops, vegetable production is small. The value of commercial vegetable production (all figures excluding potatoes) in Manitoba in 2011 was $30.8 million.[42] The most valuable of these crops were carrots ($6.7 million), dry onions ($5.4 million), and cauliflower ($2.9 million). While this is significant, the total acreage of vegetables harvested in 2011 was 4,004 acres. Many farms in Manitoba are larger than the total area of vegetables harvested in the province that year.[43]

There are many small scale vegetable growers in Manitoba that sell at farmers' markets, through CSAs, or other methods of direct marketing, although these have not been comprehensively quantified. In total there are eight certified organic vegetable growers.

Fruit: Manitoba is home to a small fruit industry. In 2009, only 501 acres of fruit was harvested in Manitoba. Strawberries (234 acres) were the largest sector, followed by Saskatoon berries (195 acres), and raspberries (51 acres). There were also five acres of apples planted in Manitoba and 21 acres of other fruit. Most fruit was grown as part of U-pick or farmers' market operations. One reason for the decline of fruit production acreage is a trending decline in interest in U-pick fruit.[44] Fruit production in 2011 in Manitoba totaled $1.7 million.[45] Manitoba is home to five certified organic fruit growers.

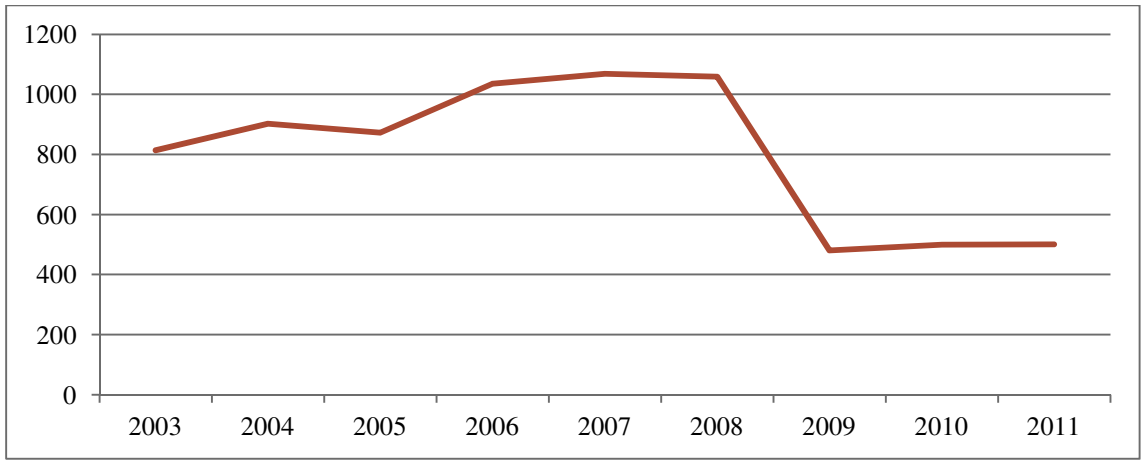


Figure 21 - Total fruit harvested (acres) in Manitoba

FRESHWATER FISHERIES

Manitoba is home to a $31 million freshwater fishery, focused on pickerel, mullet, whitefish, and northern pike. Of these, pickerel is by far the most valuable species, accounting for 70% of sales value but only 39% of catch weight. Lake Winnipeg accounts for two-thirds of the value of fish caught, while Lake Manitoba, Lake Winnipegosis and northern lakes also have commercial fishing activity. The fishing industry employs 3,155 Manitobans.[46]

Fish are sold through the Freshwater Fish Marketing Board, a collective marketing agency for all fish caught in western Canada's freshwater fishery, which has its processing facilities in Winnipeg. The Province of Manitoba is seeking eco-certification for Manitoba's entire fishery.[47] Currently, nearly all commercial fish production is exported. While this study has focused primarily on agricultural production, freshwater fisheries could become a key component of a local, sustainable food economy.

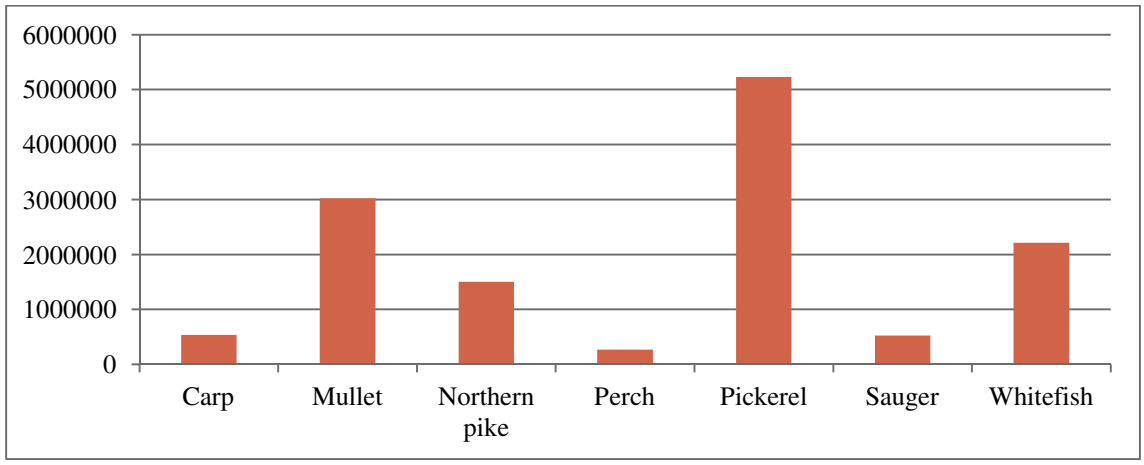


Figure 22 - Average Volume (kgs) of Fish Caught in Manitoba's Commercial Fishery, 1999-2009

LOCAL, SUSTAINABLE FARMER SURVEY

In 2011-2012, Food Matters Manitoba conducted a survey of local, sustainable farmers. The purpose of the survey was to identify interest in selling to local institutions and cafeterias and what would be required for farmers to reach these markets. While the survey included a relatively small number of farmers, it did produce several interesting results.

The survey received 53 responses. Of these most were farmers (40), while approximately one-third were processors (19).[†] Key findings included:

Top producer identified needs to become market ready:

- On and off farm storage
- Improved packaging
- Scale up production
- Scale up infrastructure
- Improved marketing

- 43% of respondents were in their first three years of farming, suggesting that the local, sustainable food economy is providing opportunities for new entrants to agriculture.
- 26% currently sell to institutions or cafeterias while 88% said they were interested in selling to institutions or cafeterias.
- Only 39% of farmers said that they were market-ready to sell to institutions or cafeterias. 82% of established farmers (more than three years) were market ready while only 22% of new farmers said that they were.
- Farm gate sales and farmers' marketing were the most commonly used type of sales amongst surveyed farmers.
- Producers identified post-secondary schools as the most likely institutions to purchase local, sustainable food.

[†] Some respondents indicated they were both farmers and processors.

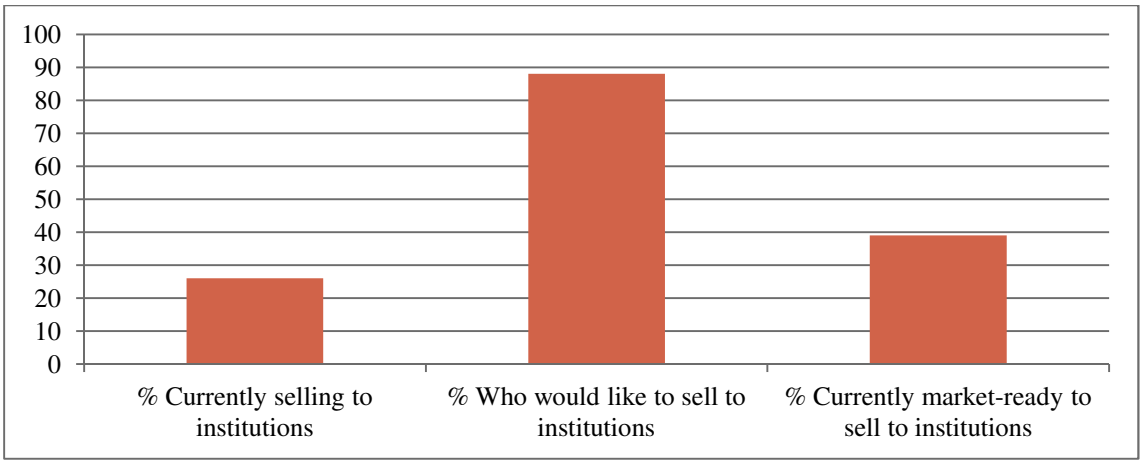


Figure 23 - Results from the 2011-2012 local, sustainable farmer survey

The survey results suggest that farmers currently involved in direct marketing are interested in marketing to institutions but most feel that they are not currently ready to do so. This is because many of the farmers are relatively new to farming and would like more experience or need to scale up their operation prior to taking on larger institutional customers.

Figure 24 - Dish at the Localvore Iron Chef Cookoff Competition (2012)

MANITOBAN CONSUMERS

CONSUMER FOOD PURCHASES

Even though Manitoba is a small province, Manitoban consumers purchase $3.6 billion of food annually, including $2.6 billion from grocery stores. While much of this food cannot be produced in Manitoba, approximately $1.5 billion of the $2.6 billion purchased in grocery stores are products that could be grown or raised in Manitoba.[48] If Manitoba purchases of natural or organic foods is similar to the typical consumer in North America, the market for these foods in Manitoba would be approximately $200 million.[49] Even if a small portion of this food was shifted to local, sustainably grown or raised food, it would result in a major boost to local, sustainable producers. For example, a 10% shift in Manitoba household food spending on foods that can be produced in Manitoba would increase local purchasing by $150 million annually.

Product Type	Manitoba Household Expenses ($millions)
Meat	$500
Dairy products	$404
Bread and bakery	$233
Fresh fruit	$320
Fresh vegetables	$265

Figure 25 - Manitoba Household Food Expenses, by product

Where are Manitobans buying their food? According to *Buy Manitoba Food: A Survey of Manitoba Grocery Shoppers* (2008), the vast majority of Manitobans do most of their grocery shopping at large supermarkets (83%). This was followed by small, independent stores (8%) and warehouse stores (5%). This poses a challenge for local, sustainable food sales as the integrated regional and national distribution networks of the large supermarkets can make it difficult to stock and sell local food products.

CONSUMER INTEREST IN LOCAL FOOD

Two recent Manitoba surveys (2008 and 2011) identify consumer shopping patterns. In the *Buy Manitoba Food* survey a majority of participants said that they purchased Manitoban foods at least once a week (56%), with vegetables cited as the most frequently purchased Manitoba product (followed by beef and

pork).[‡] The survey also indicated that the primary reason that people purchase Manitoban foods is to support the local economy (56%) or to help local farmers (25%) and because they are perceived to be high quality (20%). Only 7% said they chose local food because it helped the environment.

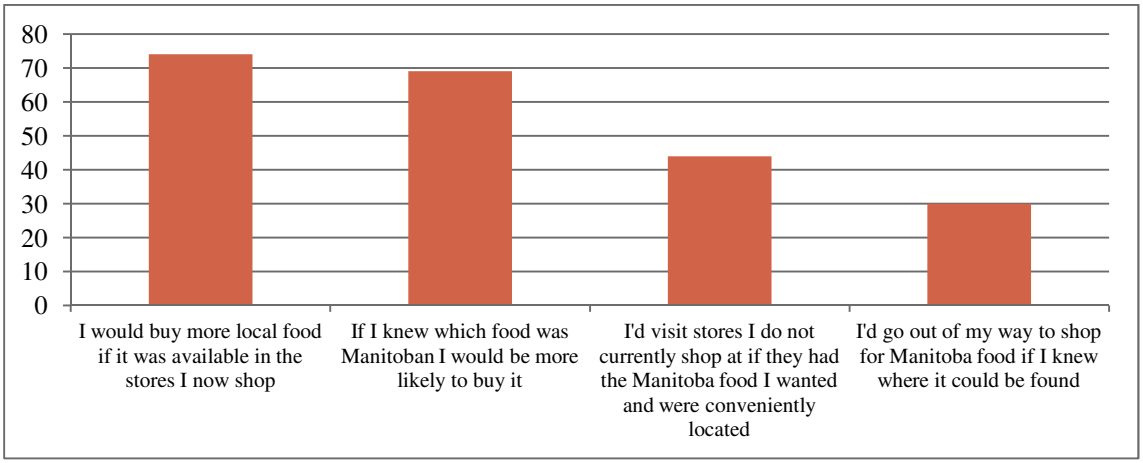


Figure 26 - Respondent perceptions of local food (Buy Local Food Survey)

Participants suggested that the best way to support Manitoba foods would be better advertising (36%), cheaper prices (23%), and better labeling (18%). Interestingly, 74% of respondents strongly agreed that they would buy more Manitoba foods if they were available in the stores they currently shopped, while 69% strongly agreed that they would purchase local foods if they knew what products were Manitoban. Only 30% indicated that they would go out of their way to shop for Manitoba foods if they knew where they could be found.[50]

This is a key challenge for the local, sustainable food market. Since the vast majority of Manitobans do their grocery shopping at large grocery chains and are unlikely to go out of their way to purchase local foods, local foods may need to become more available in larger grocery chains to increase their market share.

[‡] Since most Manitoba consumers do their grocery shopping at large supermarkets, it is unlikely that they would have found local beef. Manitoba has no federally inspected beef processing plants, and supermarkets tend to require federally inspected meat products. Consequently, it is probable that Manitoban consumers think that they are consuming Manitoba beef when they are not.

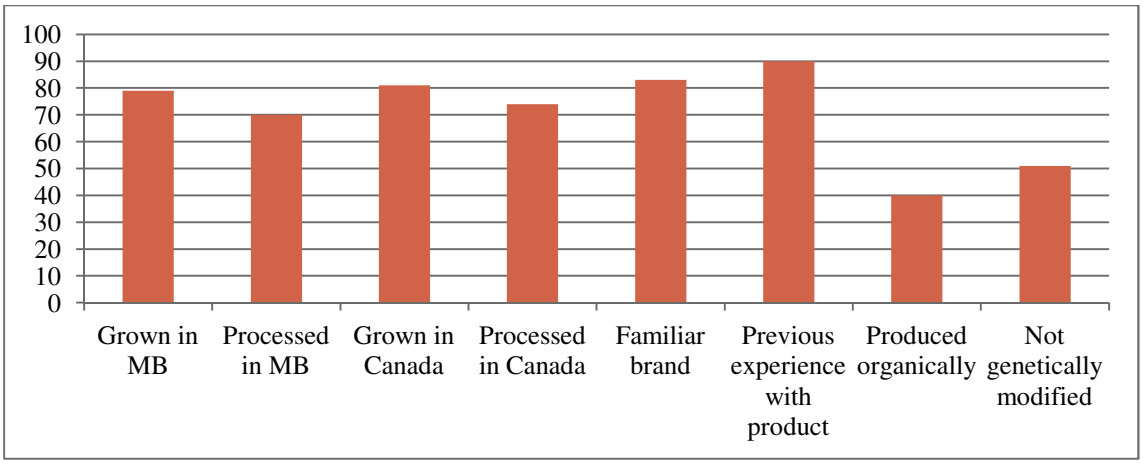


Figure 27 - Influence of Different Factors in Food Purchasing Decisions (MCMFP)

A 2011 survey conducted by the Manitoba Consumer Monitor Food Panel (MCMFP) indicated that local food was seen as helping local farmers, fresh, healthy, good for the environment, and was excellent tasting. The survey, however, also indicated that people found it difficult to find local food in winter or to identify if a food product was local. Interestingly, while many respondents indicated that finding Manitoban, or even Canadian, food was a factor in their food shopping decisions, they were less concerned about sustainability than local. Organic or non-GMO foods were a factor in purchasing decisions far less often than any other category. Only 36% of consumers surveyed believed that organic food was worth the extra cost. A large majority of consumers had not purchased organic food during their previous five shopping trips.[51]

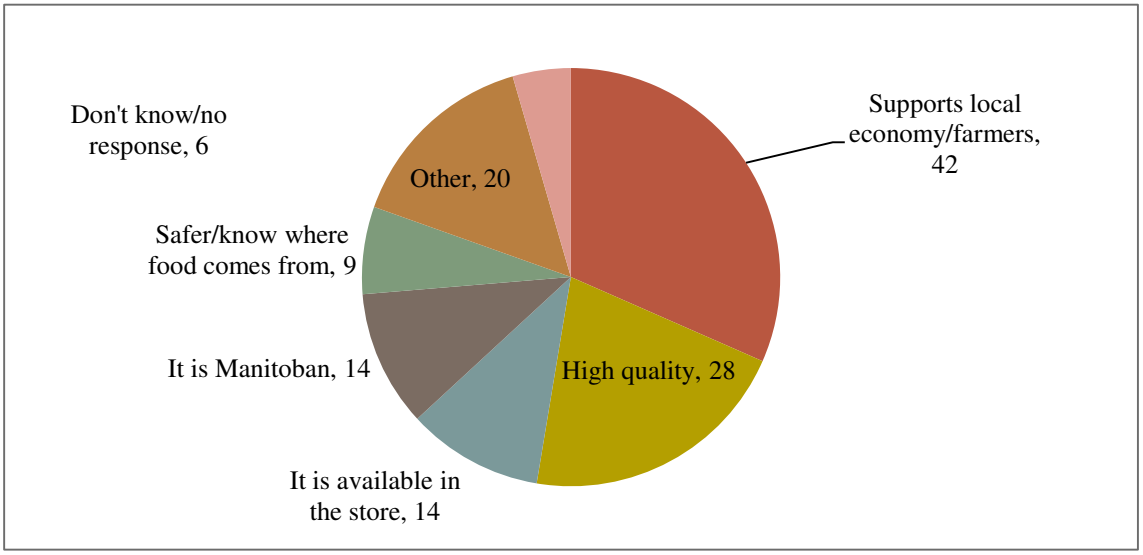


Figure 28 - Reasons for purchasing local food (Buy Local survey, 2008)

INSTITUTIONS

Limited information exists regarding how much the Province of Manitoba and its Crown agencies and corporations spend on food. While public accounts are made available for all of these organizations, food purchases are often included in broader expense categories, making it difficult to track. Additionally, there is no publically available tracking of the source of food products to know how much product was currently being purchased locally. Nevertheless, some food-specific data does exist in public accounts and other documentation.

Purchaser	Annual Food Expenditure
Procurement Services Branch	$8,400,000
Red River College	$1,958,975
Brandon University	$660,767
Manitoba hospitals (estimate)	$7,901,370
Fourteen long-term care homes in Winnipeg	$6,630,828

Figure 29 - Food purchases by selected public institutions

The Manitoba Procurement Services Branch of the Province of Manitoba spent $8.4 million on food in 2010-2011.[52] This food was used at institutions such as corrections facilities and the Selkirk Mental Health Centre. Food, however, is procured separately by many other government agencies (i.e. healthcare facilities, post-secondary institutions, schools, long-term care facilities, etc). The table above identifies the food expenditures of selected Crown agencies in Manitoba, although many have not listed despite likely have significant food purchases because the data is unavailable.

Based even on this limited data, institutional markets could be major supporters of Manitoba's local food economy. Approximately $60-$100 million is spent annually by Manitoba's public organizations on food. If only ten percent of this was diverted towards local, sustainable food, it could increase the market for local, sustainable foods by $6-10 million annually.

Two institutions highlighted by producers as possible institutional markets for their products were post-secondary and secondary schools. The following sections identify some current opportunities and challenges in these sectors.

POST-SECONDARY INSTITUTIONS

Food Matters Manitoba's local, sustainable farmer survey identified post-secondary schools as the institutional market to which farmers were most interested in marketing their products. Several Manitoba post-secondary institutions have, or are developing, formal or informal institutional procurement strategies that incorporate local, sustainable ingredients.

The University of Winnipeg has been a leader in local, sustainable food purchases. Diversity Food Services (DFS), the food service provider for the university, is a collaboration between the University of Winnipeg Community Renewal Corporation and SEED Winnipeg. DFS has incorporated local ingredients into its menus at both its university cafeterias and its public restaurant, Elements. Its kitchen standards include a commitment to fresh, seasonal, local, and organic produce as a first choice. Additionally, all chicken served at the U of W is antibiotic and hormone free and beef and pork are premium and natural products.[53]

Diversity Food Services Kitchen Philosophy:

"Combined with our commitment to using fresh, authentic ingredients, we start with food in its simplest, most natural form. We purchase local and seasonal products…Our food is well made, the flavours are real, culturally authentic, and well delivered. Community begins here – welcome to our table!"

The University of Manitoba Food Services purchases Manitoba grown/raised bison, chicken, potatoes, and dairy products. It is also looking to expand natural and organic purchasing programs and to purchase fair trade coffee for some of its coffee outlets.[54] This is part of a broader commitment to environmental sustainability in food operations that also includes waste reduction and education. The recent U of M sustainability strategy includes goals to expand awareness of the importance and benefits of sustainable food, schedule farm tours for students on campus, create a University of Manitoba Food Charter, and source local, organic and fair trade food and beverages.[55]

An example of a post-secondary institution purchasing local food outside of Winnipeg is the Manitoba Institute for Culinary Arts (MICA) at Assiniboine Community College in Brandon. MICA purchases much of the product they use for their teaching kitchens and restaurant locally and even grow many of their own greens and herbs on site in partnership with the college's horticulture program. This is unique because of MICA's role in training chefs that will go on to work at other restaurants and institutions throughout the province. While there is no formal local procurement strategy, MICA does attempt to purchase and incorporate local ingredients as much as possible for their training programs and restaurant.

SCHOOLS

There are 39 million meals eaten in Manitoba schools annually. Since 21% of Manitoba schools have cafeterias, and since most of these schools report that between 25 and 50% of their students use the cafeteria daily, it can be estimated that between two and four million meals are eaten in Manitoba school cafeterias annually.[56] Secondary schools have often been identified as possible sites for farm to cafeteria programs. Schools are also home to

home economics and culinary arts programs that teach food skills. Farm to cafeteria programs in the school context have the opportunity to engage young people in the local food economy while teaching new food preparation skills. In recent years, Food Matters Manitoba has worked closely with several Winnipeg secondary schools to support farm to cafeteria programs.

Based on a series of interviews with culinary arts teachers and cafeteria managers at Manitoba secondary schools, several concerns and opportunities related to local food were identified. Participants identified that cost was the major factor that would limit their ability to purchase locally, as well as school requirements for federally inspected foods. Other concerns included limited on-site food storage space, the need for reliable distribution schedules to fit into the school day, difficulties administering payments and invoices for multiple sources (as opposed to a single distributor), and concern that students would go to nearby restaurants if food was too expensive or not what they wanted to eat.

While there were challenges, teachers also saw value in local, sustainable food as part of a broader sustainability mandate and as an excellent teaching opportunity, both for culinary arts students and students purchasing food from school cafeterias. Schools could also be a way to create markets for local products in rural communities, as rural schools could adopt supporting their local producers as part of their mandate. Challenges such as price or administrative barriers can be overcome with broad support from students, parents, and staff.

Garden Valley School Division is the only school division in Manitoba to include local food in its nutrition policy. It states:

"Schools should give preference to local products and suppliers…Schools should give preference to environmentally friendly practices in the implementation of school nutrition plans."

SOME GOOD NEWS

THERE IS GROWING DEMAND

Anecdotally, nearly all participants agreed that the demand for local food is growing. Farmers and processors spoke of increased demand while distributors said that their customers were asking them more regularly for local products. While the growth in sales of local food was not quantified, there are a couple of indicators that demonstrate that there is, indeed, growing demand for local food. For example, there are 61 farmers' markets listed in the 2012 Manitoba Local Produce Guide, up from 47 in the 2009 guide.[57] Similarly, there are now 17 CSA farms in Manitoba, including many new entrants to farming, up from four in 2003.[58] The growth of the farmers' market and CSA sector supports the suggestion that interest in local food is growing.

SMALL (BUT LARGE PER CAPITA)

While Manitoba's local food economy may appear small, according to research conducted by the Canadian Co-operative Association, Manitoba actually has a significant number of "local food initiatives"[§] per capita. When the data was compiled in 2009, Manitoba had 125 local food initiatives per million people, ranking it third in the country behind only Prince Edward Island and Nova Scotia. Manitoba also had the second highest number of farmers' markets per capita (36 per million) and the third highest number of CSAs (13 per million).[59] There is a lot happening in Manitoba for the size of our province, albeit often at a smaller scale than is seen in larger provinces.

[§] A "local food initiative" was defined as: restaurant and chef initiatives, farmers' markets, local food in grocery stores, community supported agriculture farms, food box programs, food security and policy groups, culinary tourism and regional cuisine, institutional local food procurement, regional value chains, and other initiatives including agricultural land protection, incubator kitchens, produce auctions, marketing groups, and new farmer training.

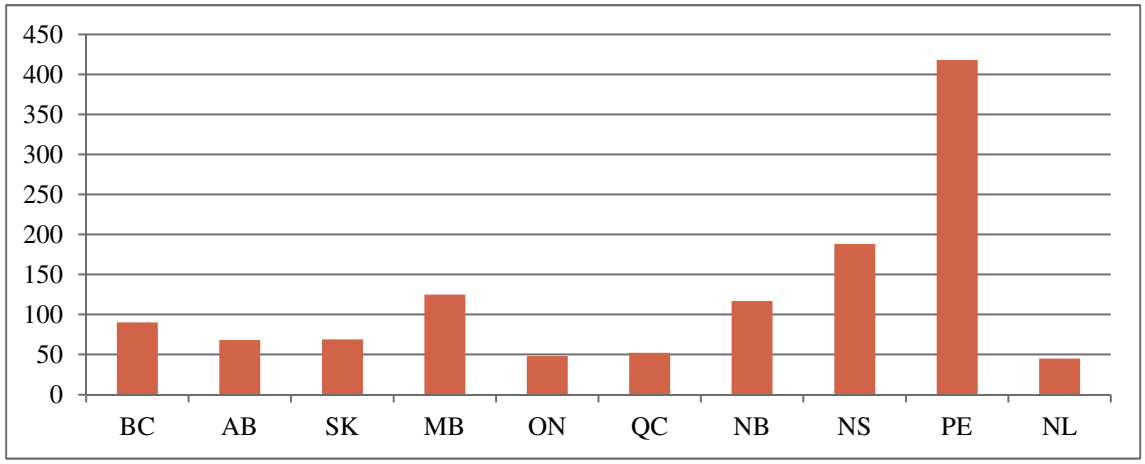


Figure 30 - "Local Food Initiatives" Per Million People, By Province (CCA)

PASSION AND CREATIVITY

Manitoba's local, sustainable food economy has a history of passion and creativity. Manitoba has pioneered many ideas and concepts that support the local, sustainable food economy. Since local, sustainable food does face considerable challenges, farmers, processors, and eaters have been remarkably creative in overcoming barriers and obstacles. The Harvest Moon Society and the Harvest Moon Local Food Initiative (HMLFI), for example, have brought farmers and eaters together in a distribution network that reduces some of the distribution inefficiencies for farmers. Buying clubs organized through HMLFI allow consumers to order from several farmers, and for farmers to reduce distribution time and costs with centralized drop-off points.[60] The Harvest Moon Society also brings eaters and food producers together around a variety of activities, including a music festival, skills workshops, and educational opportunities. This entirely grassroots-driven initiative has facilitated urban-rural exchange and enabled farmers to sell products to urban residents.

YOUTHFUL ENERGY

Throughout the interviews that were conducted during this project, it became clear that many people involved in producing local, sustainable food are young farmers. Many participants had been farming for relatively few years, but were passionate about food and saw farming

as the natural way to live out that passion. This counters the overall trend towards older farmers seen in the agricultural census. Anecdotally, at least, it appears that a significant number of young people are getting involved in local agricultural production. Our farmer survey indicated a large number of new and aspiring farmers. Similarly, a recent feasibility study indicated that 75% of suppliers for the local, specialty food market had been in business for less than five years.[61] One reason why this might not have been recorded in the census is the very small size of many of these operations, who are often in their first years of growing.[62] It will be interesting to see if, and how, this is reflected in five years' time after these farms have had time to grow and develop.

While there were many young farmers involved in the local food economy, many of the people that were interviewed were long time farmers who had only recently started selling to local, sustainable markets. Some of these sell to both conventional and local (often direct) markets. For these farmers, the local food economy provided both a new market for their products as well as a way to live out their interest in sustainability. These farmers had more experience farming than their younger counterparts, but many have had to learn how to not only grow or produce food but market and distribute it themselves.

Young or old, nearly all of the producers that were interviewed had been selling locally, sustainably produced products for a relatively short amount of time. Whether new farmers or long-time farmers marketing in a new way, they were learning how best to market locally. There is a lot of commitment and passion among participants in the local food economy and, as these farmers gain experience in the coming years, this enthusiasm, energy, and creativity will help nurture the growth of Manitoba's local food economy.

CHALLENGES

While there is good news in Manitoba's local food economy and a growing energy and excitement about local, sustainable food in Manitoba, there continue to be challenges in building this new economy. Big challenges. Across the food system, barriers are limiting the opportunities of the local food economy. The following section is based on challenges expressed during interviews with farmers, processors, institutions, and restaurants. All participants were asked to describe the barriers that were limiting them from selling or buying more in the local food economy. As identified in Figure 31, participants identified barriers at every stage of the local food economy: local food production, processing, distribution, storage, regulations, consumer awareness, and more. While these challenges are not insurmountable, they will take a concerted effort and appropriate investments from a variety of stakeholders to address.

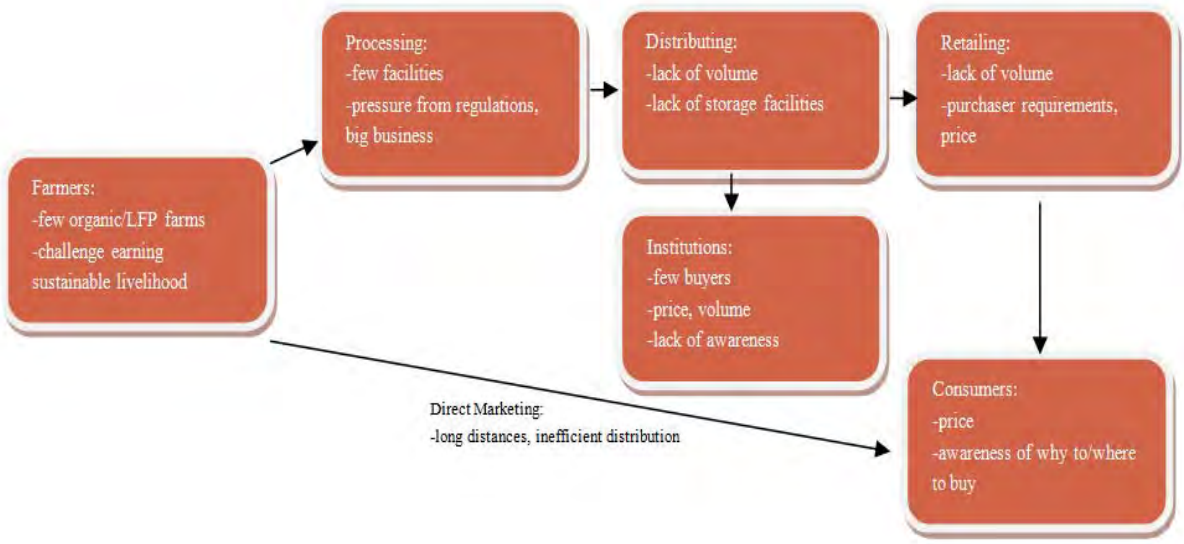


Figure 31 - Challenges exist at all stages of the local, sustainable food economy

CHALLENGE 1: DISTRIBUTION

Distribution poses a significant challenge for the development of a vibrant local food economy in Manitoba. As Winnipeg is the primary market for most local food produced in Manitoba, farmers who live further away from Winnipeg face barriers transporting their product to market. Indeed, Manitoba farmers live, on average, 195 km away from Winnipeg. A Winnipegger attempting to enjoy a 100-mile diet could not even purchase their food from the average Manitoba farmer! While farms of some types, such as vegetables (116 km) and fruits (133 km) are located, on average, somewhat closer to Winnipeg others, such as cattle farms (205 km), are further away.

Figure 32 - Rings indicate 50 km, 100 km, and 150 km from Winnipeg. Note that much of the province is further than 150 km away from the province's largest market.

Not surprisingly, farmers who sell to local markets likely live closer to Winnipeg than the average farmer. For example, the average distance to Winnipeg of participants in our farmer survey was 76 km. Nevertheless, distribution is a major expense for many participants in the local, sustainable food economy. For farmers further from Winnipeg, distance may prevent participation in the local food economy altogether due to transportation cost and time.

Farmers reported that distribution takes a lot of their time. This not only includes driving into Winnipeg but, for many, delivering many small orders individually to consumers and restaurants. A recent feasibility study indicated that 68% of suppliers of local specialty foods did their own direct marketing to retailers.[63] While some farmers have reduced their distribution time through central drop-off points, most continue to deliver door-to-door to each purchaser. Often farmers spend whole days completing deliveries, taking up time that could otherwise be spent farming. In addition to taking a lot of time, distribution has become increasingly expensive as fuel prices rise, and fuel use affects environmental sustainability.

Although this method of marketing may not be economically efficient, farmers spoke of aspects to this marketing system that they appreciated. Several appreciated getting to know

their customers. Some talked about the convenience they provided to customers or restaurants as being a reason why people purchased their product. Others thought that the in-person relationship they developed with their customers led to further sales in the future. One even spoke of his weekly delivery trips to Winnipeg as his "holiday." In short, relationships developed with customers were one of the main reasons why some farmers were interested in marketing their product locally in the first place.

Yet farmers also expressed frustration with the inefficiencies of this system. For example, some spoke of meeting their neighbours at several businesses in Winnipeg, doing essentially the same route on the same day – and both had traveled hundreds of kilometres to complete the delivery. Others spoke of the inefficiencies of driving around the city for orders that are generally very small or of trying to track down customers who were not home when they said they would be. In many ways, the current direct marketing system is inefficient in terms of time and energy spent by farmers, as well as on fuel, vehicles, and other resources that are needed to complete the drop-offs.

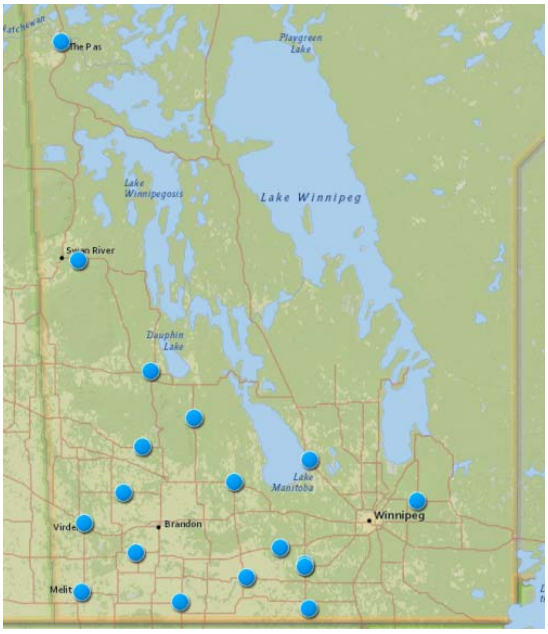
A challenge expressed by farmers living further from Winnipeg is that they have to decline orders because they have no storage in Winnipeg and it is not economical for them to take more frequent trips to the city. If storage facilities were available, they said, they could store product in Winnipeg, making it easier to sell to regular customers or larger, more frequent purchasers. This would enable farmers to provide a more consistent supply which could help them access additional consumers. In particular, one producer mentioned a need for certified organic storage facilities that would allow organic producers to store their products in the city without risk of mixing organic and conventional products.

Manitoba has two distributors that emphasize sustainable products, Fresh Option Organic Delivery and World Wise Distribution. These distributors do provide an option for producers not interested in direct marketing, while also making it easier to access larger (ie institutional) markets that may not want to buy from individual producers. Many Manitoba farmers in the local food economy, however, still directly market their product. In part this is a function of scale, as many people selling local, sustainable products are producing them on a small scale. Research has suggested, however, that distribution can have benefits for small scale producers, who may not realize the costs of handling sales and distribution themselves.[64] Whether it is the cost of fuel, promotional materials, or even the time taken to market products, distribution and marketing are a significant cost.

Mainstream distributors (i.e. Sysco, GFS, etc.) are not an option for most participants in the local, sustainable food economy. While these distributors service the majority of the institutional and restaurant food delivery market, there are also steep barriers to entry for producers or processors hoping to sell to these distributors. These include liability insurance and food safety credentials, in addition to requirements for being able to consistently supply large volumes of product. Smaller producers do not have the volume nor the ability to achieve the food safety certifications required in order to participate in these markets.

CHALLENGE 2: PROCESSING

Manitoba has a significant infrastructure deficit of provincial food processing capacity to be overcome if a vibrant local, sustainable food system is to be created. Participants expressed several concerns about processing, notably that Manitoba's lack of processing capacity limited their ability to market and/or develop their products. The result in some sectors was that a supply would be available from farmers, there would be demand for the product, but there was no way in Manitoba to do the necessary processing to provide the purchaser with the product they wanted. While concerns were expressed across multiple sectors, this section will focus on meats, given the large number of livestock producers in Manitoba and the lack of processing facilities for meat products.



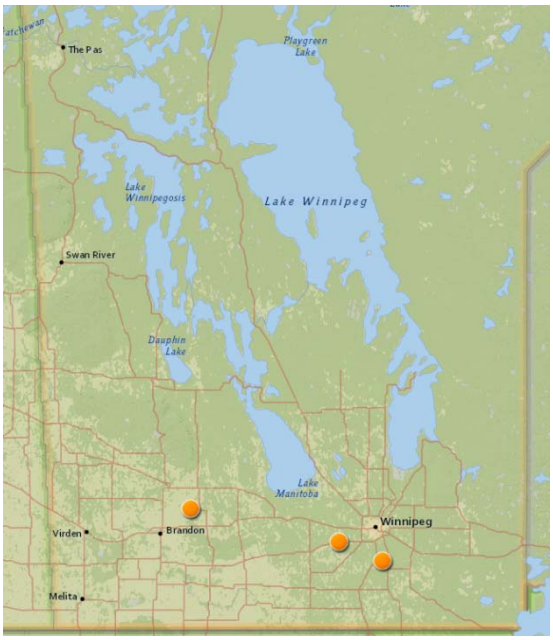


Figure 33 – Provincially inspected abattoirs for cattle (above). Below: Chicken abattoirs in Manitoba (data from the MAFRI website.)

Manitoba currently has 28 provincially inspected abattoirs, although many of these only process a few animal species. As a result, some livestock sectors reported having only a handful of options in Manitoba for slaughtering their animals (for example, the Province of Manitoba lists only three provincially inspected chicken abattoirs).[65] This means that producers often have to travel long distances to get their animals slaughtered in an inspected facility. This is time consuming and costly. It also means that there is little competition so farmers have few choices if they are concerned about price or quality.

The lack of abattoirs affects Manitoba producers' ability to bring meat products to market. For example, one industry association reported having to turn down a restaurant because the limited slaughter capacity for their animals meant they could not guarantee a consistent supply to the purchaser. Furthermore, while there are relatively few provincially inspected plants, there are even fewer federally inspected options: three pork facilities, two for chicken, and none for beef. This makes it impossible to get Manitoba beef in to institutions and grocery stores, many of which require federal inspection. And finally, for some sectors, additional processing is necessary beyond what is available in most plants. For example, while there are abattoirs that will process whole chickens, the largest market for chickens is in cut birds. Without this processing, smaller scale chicken producers cannot access the much larger cut chicken market.

Abattoirs themselves are facing significant pressure. Since 1997, provincially inspected abattoirs have closed in Boissevain, Carberry, Roblin, Russell, Kenton, Minnedosa, Lockport, Treherne and Winnipeg.[66] Additionally, interviewees mentioned that some existing abattoirs have specialized, meaning that there are fewer abattoirs for some kinds of animals. For example, Winkler Meats, which was Manitoba's only federally inspected beef processing facility from 2003 to 2010, used to process both beef and pork. Since 2010, however, it has only processed pork.

There are several reasons for the decline in the number of processing facilities. First, there are fewer farmers looking to sell and process their animals locally, meaning that there is not necessarily the current supply necessary to support more abattoirs. Abattoirs are facing market pressures from larger processors that are able to use their economies of scale to process meat for lower costs. Finally, abattoirs indicated that it is costly for them to keep up with new and emerging food safety regulations. While acknowledging the importance of food safety regulations, some participants expressed concern that regulatory changes disproportionately affected smaller scale processors. There are funding programs that help cover the costs of adopting new food safety programs, but economies of scale make it more difficult for smaller abattoirs to invest in new infrastructure or equipment to meet changing standards.

CHALLENGE 3: PURCHASER REQUIREMENTS

Food procurement contracts listed on MERX, a major electronic tendering service for government procurement contracts, illustrate how current purchasing policies present a barrier to local purchasing. Take, for example, the Request for Proposals for food for Canadian Forces Base Shilo, located east of Brandon, in September 2011. The tender included several items that would have been in season in Manitoba at the time (such as carrots, potatoes, and onions) as well as imported items (such as avocadoes, mangos, and bananas). To win the bid for any particular item, however, a bidder had to submit a tender for 90% of the requested batch. Consequently, while a large distributor could potentially include local food as a component of their bid, a small distributor focusing on local, sustainable foods would have difficulty submitting an eligible bid, let alone winning the contract.

This is just one example of how procurement policies and requirements of large-scale purchasers limit possibilities for local food procurement. There are, however, several others.

First, most large scale institutions and the Government of Manitoba's Procurement Services Branch, require suppliers to have federally inspected facilities. Since there are no federally inspected beef processing plants in Manitoba, for example, it is impossible to get Manitoba beef into many institutions. Some have even more stringent food safety requirements above and beyond federal inspection. Some processors reported that they would have to implement costly technology and time consuming processes in order to sell to larger purchasers. Several said that the cost and hassle of these certifications was not worth it, even if it could open new market channels for their products.

Just as some farmers indicated that they appreciated the personal connection despite the inefficiencies, some chefs too indicated that they enjoyed interacting with the farmers that provided their food. Yet, others said that it was too time consuming to deal with several different farmers coming to their door rather than working with a single distributor. Unless several local, sustainable products are sold together by a distributor, many chefs and food purchasers do not feel that they have the time to source from many smaller local sources. This includes not only the time required for sourcing and receiving multiple orders, but also the time required to complete invoices and payments to multiple providers.

Interestingly, several farmers also had similar comments about institutions. They suggested that it was difficult to know who to talk to at institutions and larger purchasers, that these people were often hard to contact, and that there was no way to know who would be interested in purchasing locally. Identifying institutional purchasers was seen as a time

consuming process that was often not worth the hassle, particularly when they were already able to sell their existing product to individual consumers.

A third purchaser requirement is volume and product consistency. Many of the farms and processors participating in the local food economy in Manitoba are small. While this is advantageous for direct marketing, it makes it more difficult for selling to institutions or businesses that have a high volume of sales. The volume needs to be large, consistent and reliable. For example, one distributor said that they expect a 99.5% fill rate, meaning that for every thousand boxes ordered, no more than five could go unfilled or improperly delivered. Many in the local, sustainable food economy would not be able to guarantee this level of consistency, given the small batch sizes they work with. Volume can also be a challenge when selling to restaurants as chefs are looking for large volumes of particular cuts of meat. For a farmer this means trying to find markets for less popular cuts, creating storage and marketing challenges.

Some institutions identified consistent supply as a challenge for purchasing locally. Given the seasonal nature of food production in Manitoba, it is difficult to maintain an ongoing supply of product throughout the year. Some restaurants that were interviewed, for example, mentioned that they would like to feature local ingredients for more of the year but are currently unable to. Whether through season extension or improved storage, there is a market for local products beyond what Manitoba producers are currently able to provide.

Key Issues in Sourcing Locally Produce Specialty Food Items Identified By Retailers (BCI Marketing Partners Inc, 2011):

1. Availability
2. Potential Suppliers
3. Supply Consistency
4. Seasonality

While restaurants or distributors require consistent supply, some farmers said that they had grown food specifically requested by restaurants in the past, only to be told when the product was ready that it was no longer needed. Negative experiences like this have discouraged some farmers from focusing on the restaurant market. Questions of consistent supply, it seems, were best handled as long-term trust developed between restaurants and farmers, facilitating flexibility for both sides as well as understanding of what was required.

Fourth, some purchasers identified challenges regarding how product is received. For example, one institution talked about wanting to buy chicken directly from farmers, but farmers were only able to supply whole birds. The institution could use these birds for special events, but due to the high volume of food that they sell it was not feasible for them to purchase whole birds and process them on site. Similar issues were identified with other products as well. Some institutions and restaurants receive pre-washed or pre-cut vegetables and fruit, something that would not be feasible for most local, sustainable farmers to provide.

CHALLENGE 4: CONSUMER AWARENESS

The media has been instrumental raising the profile of the local food economy in other parts of Canada. While Winnipeg newspaper coverage of local food is increasing, and while media coverage represents only one component of public discourse, the historic relative lack of coverage is, perhaps, an indication of a broader lack of public awareness about local food identified by interview participants.[**]

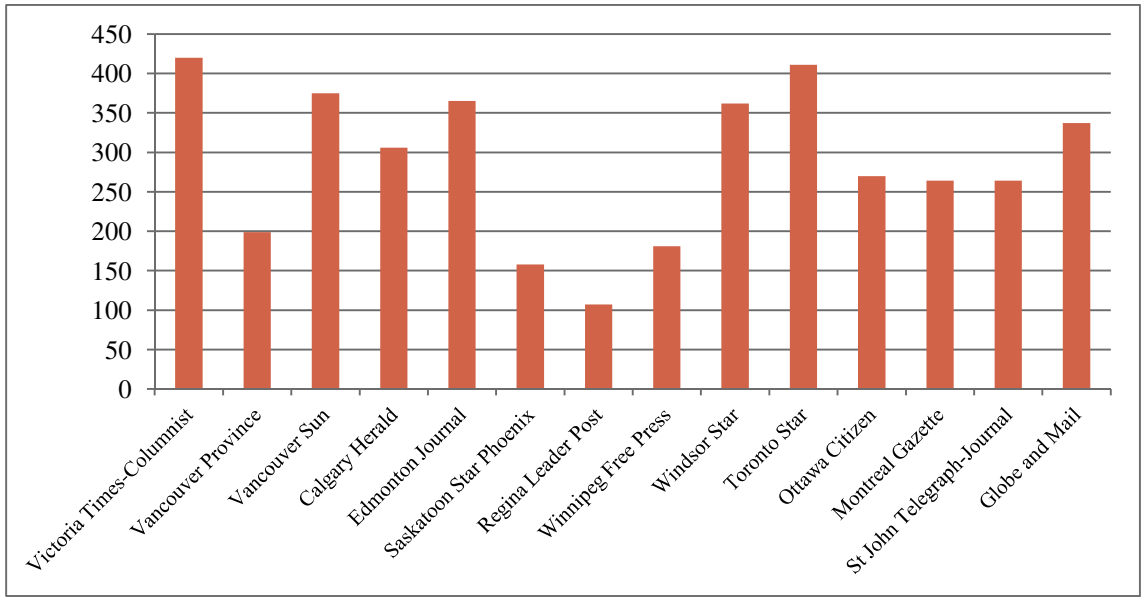


Figure 34 - Mentions of Local Food By Newspaper, June 2006 - May 2012 (Canadian Newsstand Database)

Since mid-2006,[††] the Winnipeg Free Press has printed 181 articles that included the phrase "local food." In comparison, papers such as the Victoria Times-Columnist (420 articles), Toronto Star (411 articles), Vancouver Sun (375), Edmonton Journal (365) and Windsor Star (362) have all published at least twice as many articles on local food. The only major Canadian papers to include fewer "local food" articles than the Winnipeg Free Press were the Regina Leader Post and the Saskatoon Star Phoenix.[67]

Participants in the local food system at all levels expressed concern about the level of consumer awareness of local food in Manitoba. People who were interviewed for this

[**] In some ways this is a "chicken and egg" situation. Does media coverage drive public interest? Or does public interest push media to cover an issue? Either way, the relative lack of media coverage of local food in Winnipeg does suggest that this issue was less prominent in the city than in other parts of Canada since 2006.

[††] The year 2006 was chosen because that is the extent of Canadian Newsstand's database for the Winnipeg Free Press.

assessment suggested that Manitoba consumers were often not aware about where to purchase local foods, did not know what kinds of products could be purchased locally, and were unfamiliar with the seasonality of the local food economy.

Many people interviewed said that many Manitobans are still not aware of the reasons why buying local is important, or do not know what local products are. Small producers were concerned that claims of larger competitors, such as claims of "natural" products, would confuse consumers and take away market opportunities for smaller producers and processors. Many talked about the importance of continuing to educate consumers regarding the value of local food. This was particularly the case because of the hesitance of Manitobans to pay more for food (see Challenge 6). One restaurant said that it was important to explain to customers why they were paying more for their meal. While people were initially hesitant to pay more, they said, their customers tended to leave feeling good.

Non-monetary awareness issues were identified by participants including seasonality and consistency. Producers pointed out that consumers expect to be able to find fresh products throughout the year, which Manitoba's seasons do not accommodate for. Also, unlike food produced in larger operations, it is tougher to maintain exact product consistency or size in a smaller scale system. In this way a local, sustainable food economy requires some flexibility and understanding from consumers.

And finally, a third piece of consumer awareness identified as a concern was that consumers do not necessarily know where to find local food products. This finding echoes the Buy Manitoba survey which indicated that 21% of Manitobans did not purchase local food because they did not know which foods were local while 18% of respondents said that local food was not available in their area. Several participants said that awareness of what types of food can be produced locally and places to purchase local foods was low.

The impression of several interviewees was that local food awareness was much higher in Winnipeg than in the rest of the province. While some participants saw rural communities as potential marketing opportunities for local, sustainable foods, most were not optimistic about the level of interest for local food in rural areas. As one farmer pointed out, their whole community knew that they were there and what they sold, but they had hardly any customers in their local community. Most of their product was still sold to Winnipeg.

Three theories existed regarding the perceived lack of interest in local, sustainable foods in rural areas. First, it was suggested that many people in rural areas still have access to local food products from friends, neighbours, or grow it themselves. Secondly, since most local food is marketed to Winnipeg, there is less local food available in rural communities. And finally, there have been fewer awareness building campaigns and activities around local, sustainable foods outside of Winnipeg. Some producers talked about the "Perimeteritis" that focuses local food education and services in Winnipeg while providing less for rural communities. While rural markets are much smaller than Winnipeg, they do offer the potential of markets closer to producers or processors, reducing distribution time and costs.

CHALLENGE 5: REGULATIONS AND POLICY

The policies and regulations governing agriculture and food processing were identified several times as a limiting factor concerning the viability of the local, sustainable food economy. A diversity of policies were identified as concerns, from crop insurance for small producers to manure spreading to food safety. All were connected through an overarching theme that regulations have been developed to address the realities of large-scale operations that do not reflect the unique nature of smaller-scale agriculture or production for local, sustainable markets. All participants agreed that food safety and agricultural regulations were important and essential to maintain. However, many suggested reforms that could make regulations more amenable to local, sustainable production.

One concern expressed by several participants, particularly food processors, was that food safety regulations can be prohibitively expensive for smaller-scale operations. This was seen to both reduce the viability of existing businesses, while also presenting a significant disincentive for potential new entrants. Many people talked about farmers or processors who had closed as a direct result of regulatory changes. Participants described how regulatory changes have put pressure on smaller-scale farmers and processors, which have less business to cover the cost of new mandatory equipment or facilities. One example that was given was mandatory tagging of sheep. The barcode used to track animals is quite expensive per animal for smaller operations, one farmer said, but would be less so as economies of scale increase. Yet the animals being raised by the smaller operations are often direct marketed – achieving the traceability sought by the tagging system.

One particular way that food safety regulations were seen as a barrier were the costs associated with nutritional labelling. Doing the necessary testing to be able to complete a nutrition label is quite expensive and is often a challenge for smaller-scale processors to complete. It is, however, necessary if they are to expand their market or sell to retailers.

The Food Development Centre (FDC) in Portage la Prairie has been an important support for many new local food products by providing a variety of expertise to Manitoba entrepreneurs. Some participants, however, identified the cost of accessing the FDC's services as a barrier to the development of their products. This is, in part, a reflection of the small scale (and minimum resources) at which many participants of the local, sustainable food sector operate. It was suggested that reduced fees for these services would enable more people to use the facility. Additionally, many people live far from Portage la Prairie, making access to the centre more difficult. MAFRI's pilot commercial kitchen in Swan River was identified as a possible model for regional facilities across the province that would increase access to commercial kitchens.

Figure 35 – Manitoba's Food Development Centre. Photo source: http://www.gov.mb.ca/agriculture/fdc/fdc01s00.html.

At times the food safety regulations that people were concerned with were not government regulations but the regulations of distributors or purchasers (i.e. large retail stores). For example, one processor indicated that they would have to pay $50,000 to achieve the safety standards required by a large grocery chain along with an annual audit fee. This would enable them to increase the volume of product sold, but they felt that the increased volume would not be worth the additional fees and hassle.

Some people interviewed indicated that government incentives have been provided for large scale processors in Manitoba and suggested that similar incentives could also benefit smaller processors. For example, in September 2012, the federal government provided $4.5 million in funding to upgrade Maple Leaf plants in Manitoba to increase productivity and production capacity.[68] Support for smaller scale processors could help these businesses meet food safety requirements or enable them to invest in necessary processing, storage, or distribution infrastructure. This, in turn, could create jobs in rural communities and enable the local food economy to grow.

Farmers that participated in the consultations for this project were nearly unanimous in their support for supply management. They indicated that supply management provided significant economic advantages for farmers. Figure 35 demonstrates the income stability that supply management has provided farmers. While the pork industry (not supply managed) experienced significant income growth in the early 2000s, income has plunged in recent years. Meanwhile, the dairy and chicken sectors, both of which are supply managed, have experienced steady income growth since 1995. However, farmers also indicated that supply managed sectors can limit farmers' capacity to sell to the local, sustainable market. For example, the existing small flock quota exemption does not enable farmers to raise enough animals to earn a living from. This was particularly challenging for new entrants who could not afford quota and for farmers who wanted to participate in the local, sustainable food economy on a relatively small scale.

The local, sustainable food economy is not incompatible with supply management. For example, Manitoba's local organic dairies produce milk within a supply managed sector. Supply management also essentially ensures that several agricultural sectors remain local. Yet, while sectors such as chickens, turkeys, and eggs all have small flock exemptions, the flock sizes are not large enough for someone who wants to earn a living from farming. Quota, on the other hand, is expensive and there are minimum flock sizes (the minimum broiler quota is 30,000 kgs).[69] Some producers suggested that they would like to be able to produce more than the current maximum non-registered flock size, but that they could not afford quota and were not interested in producing the minimum amount required by quota. They also suggested that their farm sales were not in direct competition with conventional sales, and sought mechanisms to grow their farms to meet demand for local, sustainable products.

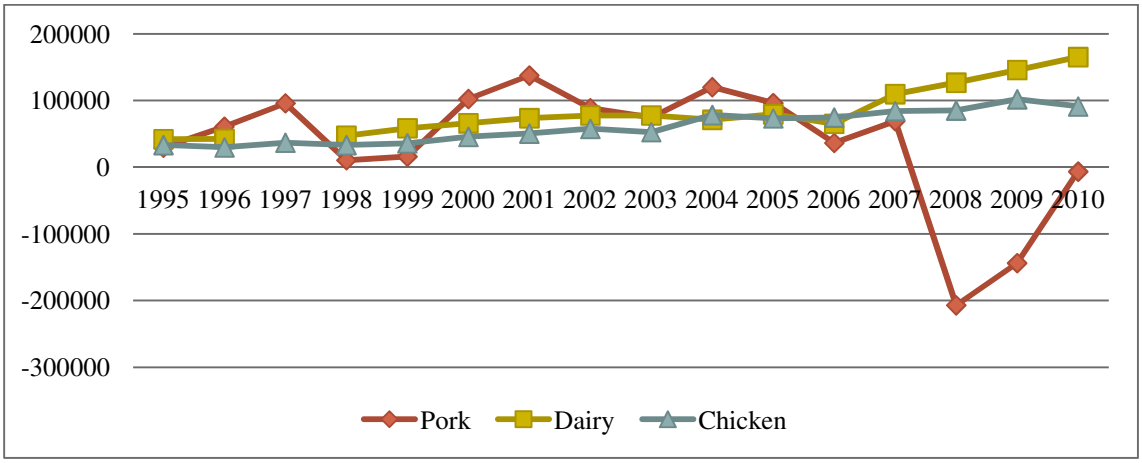


Figure 36 - Average net market income for farmers in three sectors in Manitoba (CANSIM Table 002-0053)

CHALLENGE 6: PRICE

Manitobans have a reputation for thrift. They do not want to pay more for food, even if it is local and sustainably produced. In 2008, the Buy Manitoba survey suggested that 44% of Manitobans even believed that local food should cost them *less* than foods from other places. Only 9% indicated that they thought that local foods would cost more than imported products. Manitobans seem reluctant to pay more for local food but, as one farmer pointed out, will pay more for a bottle of pop than a bundle of carrots. Several participants suggested that it would be very hard to convince people to pay extra for food unless there was a personal benefit (rather than just a broader societal good).

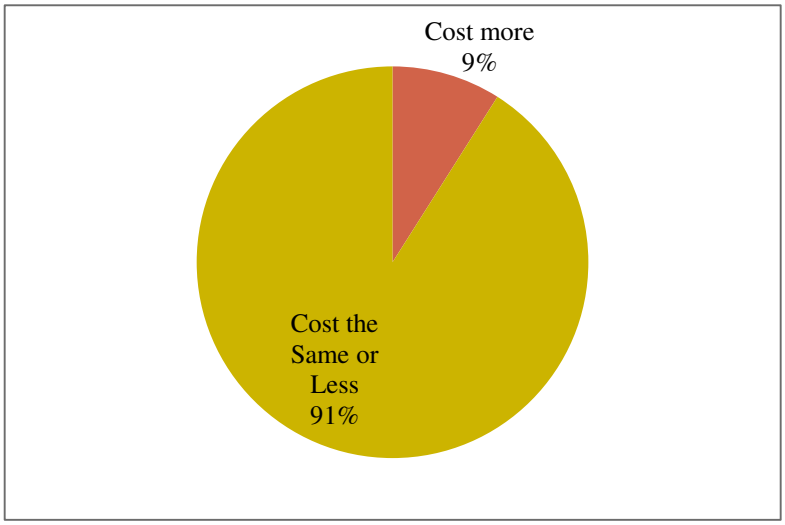


Figure 37 - Percentage of Manitobans Who Think Local Foods Would Cost More Than Imported Foods (Buy Local Manitoba Survey)

Price is a major concern for smaller scale producers and processors. For the most part they cannot compete on point-of-sale price with large scale competitors. Instead, smaller producers and processors focus on targeted markets, primarily utilized by consumers with the ability to pay a premium. This can limit the potential size of the market, by limiting it to higher income consumers. However, it is this premium enables farmers and processors to achieve an adequate price for their product.

The price of local, sustainable food has opened it to the critique that it is elitist. Indeed, low-income local, sustainable farmers are often selling to markets that they cannot afford themselves. As one farmer said, "I can't afford to eat at 95% of the places I sell to." This does not mean, however, that consumers with lower incomes do not purchase local, sustainable food when they can, as demonstrated by programs such as the Good Food Club in Winnipeg's West Broadway neighbourhood. Many farmers also expressed a desire that more people could access their food and many farmers were generous with what they produced, either selling some of it for a reduced rate or donating portions of their produce to local charities. However, it was also clear that access to food is not a problem to be solved by farmers. Rather, limited access to local, sustainable food is a matter of social policy to ensure that people have the income necessary to afford food, not the responsibility of farmers, many of whom have limited incomes themselves, to subsidize consumers.

Price point is a challenge for direct marketers selling to individual consumers. A farmer talked about how grating it was that consumers would complain about prices at the farmers' market when, as they calculated it, they had earned less than a dollar an hour growing the food. Another farmer talked about how they had been getting their cull cows processed into hamburger, which they then sold locally. As cattle prices have risen, however, they now would earn less selling their hamburger locally than by taking their cattle to auction, a major disincentive to participating in the local, sustainable food economy.

When asked about the possibility of selling to institutions, one concern that was shared by nearly all producers and processors was price. Their impression was that the prices that an institution would be able to offer would not be worthwhile for farmers. Farmers indicated that they saw institutions as primarily price-driven. As farmers in many sectors are now able to achieve a premium by selling to individual consumers, many were not enthusiastic about selling to an institution as they felt it would cut into their profit margin. In short, it was felt by some farmers that farm to cafeteria programs would be supported on the backs of farmers, rather than opening up valuable new markets.

That said, producers have been able to achieve a premium for selling their product locally. Some producers have been quite successful through their local food sales and have been able to sell their products through a variety of market channels at prices they can maintain. Several institutions and restaurants mentioned that while they have a price point that they need for their own business, they also do not want to haggle too much with farmers, because they acknowledge how hard a business farming is. Some farmers have found restaurants and institutions to be valuable customers that have enabled them to improve the profitability of their farm.

Unfortunately, for some producers, this is not enough to achieve financial sustainability and many farms barely eke out a living from their local food sales. Not dissimilarly to the broader farming community, local, sustainable farms are often subsidized through off-farm income. And also just like the broader farming community, some sectors have outperformed others in terms of creating sustainable livelihoods. Despite local, sustainable premiums it does not seem at this point that local food is a panacea to farm income challenges.

Finally, it is important to note that in many ways, price and consumer awareness go hand in hand. If consumers believe that there is value to be gained by paying more, they will. Alternatively, if people do not understand the benefits of buying local or sustainably produced food, they are unlikely to be willing to pay a premium for it. Consequently, increased education and awareness of local, sustainable food may be one component to addressing this perceived challenge.

CHALLENGE 7: MARKETING

Product marketing was mentioned as a concern by some participating producers. People who become farmers are skilled at farming and are not necessarily skilled marketers. While some farmers have done a remarkable job in marketing their product, many find this to be a challenge. And despite the growth in demand that many farmers and processors are experiencing for local, sustainable products, there was a widespread assumption that more local, sustainable food could be sold but was being limited due to inadequate marketing.

Several farmers talked about failed experiments in marketing, mentioning approaches such as ads in local papers or on the radio as having been unsuccessful. In general, advertising to a broad market (i.e. a whole community through a newspaper advertisement) was seen as less effective than targeted promotion to key audiences.

While larger businesses often have significant marketing budgets, small producers eke out small amounts for marketing from their already slim margins. Many participants reported relying solely or primarily on word of mouth to increase awareness of their product. This was seen as having positives (inexpensive to do, did not require particular marketing skill, and drew on the high quality of product that farmers provided) while also having negatives (a slow process and limited to the connections of their current market).

One particular challenge that several farmers and processors identified was improving their online presence. While an increasing number of farms and processors have websites, many still do not. Of the 152 farms and processors listed in the 2011 Manitoba Food Products

Key Challenges for Specialty Suppliers in Manitoba (BCI Marketing Partners Inc, 2011):

1. Having enough resources to bring the product to market
2. Knowing which broker or distributor to work with
3. Dealing with all the packaging and labeling regulations
4. Identifying the best markets to concentrate on
5. Developing a marketing and promotional program

Guide, 48% (73) listed websites. Many farmers and processors talked about a need to develop or improve their website as a way to increase customer awareness of their product and improve sales. This was the most frequently mentioned topic in terms of sought after marketing skills development. Basic training and support to use websites could be valuable for these producers as they attempt to raise consumer awareness about their products.

Some farmers identified that since they did not want to be responsible for marketing they relied on distributors such as Fresh Option Organic Delivery or World Wise Distribution to market their product. This relieved them of having to market their product and enabled them to spend more of their time farming. Conversely, other farmers enjoyed the challenge of marketing their product. One farmer talked about maintaining ongoing contact with his customers, even phoning them to wish them a merry Christmas, a personal touch that often led to additional sales.

Product marketing is also related to consumer education. If consumers know where and how to purchase local, sustainable products, they are more likely to do so. Alternatively, as general awareness of, and interest in, local, sustainable products increases, marketing these products will likely become easier.

CHALLENGE 8: BALANCING SUPPLY AND DEMAND

The local food economy has seen some significant imbalances of supply and demand. Some sectors of the local food economy have far higher supply than demand while others have much higher demand than supply.

An example of the former is organic milk. Manitoba has had an organic milk co-op since 2006, which markets its milk under the Organic Meadow label. However, most of Manitoba's organic milk is sold into the conventional stream, because there is not enough market for the product. Farmers do not receive their organic premium for product sold into the conventional milk supply, reducing their ability to earn a livelihood from organic production. If more organic milk was purchased it would also enable the production of other organic products, such as butter which is currently not feasible because of a lack of local organic cream. Manitoba has the organic milk and the processing capacity, but the market has yet to develop for the product.

By comparison, several other sectors of the local, sustainable food economy have more demand than they can keep up with. For example, many groups have been interested in establishing farmers' markets but have been unsuccessful due to a lack of farmers. There is a need for more farmers to keep up with current demand, let alone creating new markets.

This has implications for farm to institution efforts. Several farmers indicated that they were theoretically interested in selling to institutions but currently they had more customers than they could provide for already and so were not looking for new marketing channels. Second, there is not enough supply to fill an increased institutional demand for many local food products. Third, even though selling larger volumes to a small number of institutions rather than to many individual customers might be more efficient, it also was perceived to reduce the local premium that farmers received from their customers. However, institutional markets could be a valuable tool to provide a stable demand for local food that can spur investment in much-needed infrastructure.

There is potential to grow the local, sustainable food market. Many producers and processors saw the potential for significant growth in the supply of local, sustainable food products to keep up with growing demand. Yet, some producers identified a concern that while there was lots of demand for their product now, it would not take a large increase in supply or a drop in demand to change the economics of local production, particularly since the total possible market size in Manitoba is relatively small. Some feared that a shift in supply or demand could lead to greater competition, lower prices, and make local, sustainable farming less profitable for participating farmers or processors.

CHALLENGE 9: ON FARM OBSTACLES

There are several barriers that affect the local food economy on the farm level. One of these is scale. The small scale of production of many local producers means that it is difficult to find equipment and supplies that match the scale of their operation. For example, one farmer talked about trying to find appropriate bags for their product. When they thought they had finally found a suitable bag, they learned that they could not order them in quantities of less than 40,000 – far beyond what was needed. Similarly, people talked about looking for equipment would increase efficiency and enable them to farm more land. However, since their scale was still relatively small, they did not need large equipment. Small tractors can be far more efficient than shovels and hoes, but can be hard to find and or find parts to maintain it. Better equipment, it was argued, would enable farmers to grow more local, sustainable food.

A second major challenge expressed by several farmers is difficulty finding labour. Much of the local, sustainable food economy is labour intensive. Family members make up the workforce of many farms, but as they look to expand, or even maintain their operation, they need to find additional labour. Many people, however, are not interested in farm labour, particularly at wages that farmers can offer. Farmers said that many people are not used to doing the kinds of manual labour that is required on local, sustainable farms. Limited access to hired labour means that farmers themselves have to work harder and that productivity is limited.

The lack of adequate equipment and labour adds to the fact that farming is already hard work. Anecdotally, people reported a high turnover rate in some sectors of the local, sustainable food economy. This is not surprising given the long hours and low profit. One producer talked about working up to 17 hours a day on the farm while also working another part-time job throughout the summer to pay bills. As one aspiring farmer noted, it would be nice if farming was a career they could choose and count

on to make a living. However, given the current economic realities of farming, this is not the case for many.

On-farm storage can also be a barrier, particularly for meat products. Establishing the necessary infrastructure for safe storage can be expensive, but also enables farmers to have a consistent supply. To address storage problems, some meat producers only process pre-ordered animals and take the product straight from the abattoir to the consumer, thus eliminating the need to store it on-farm. Storage can also be a challenge for vegetable producers, who would be able to extend their sales of certain crops into the winter if adequate storage facilities were available either on or off farm.

Access to capital can be a challenge for local, sustainable farmers and processors, particularly those operating on a smaller scale. There are a number of reasons for this. People entering the local, sustainable sector are often young and have limited resources to purchase the necessary land or equipment. Credit is also difficult to acquire as lending institutions are understandably reluctant to loan money to farmers who may not have a lot of collateral, experience, or income. Meanwhile, many local, sustainable farmers do not want to acquire debt, particularly given their tight profit margins. Lack of access to capital can put local, sustainable farmers and processors in a bind. They might not be able to afford credit or have the capital required to start or expand their operation. Yet, if they were to expand their operation they could achieve greater income from farming or processing.

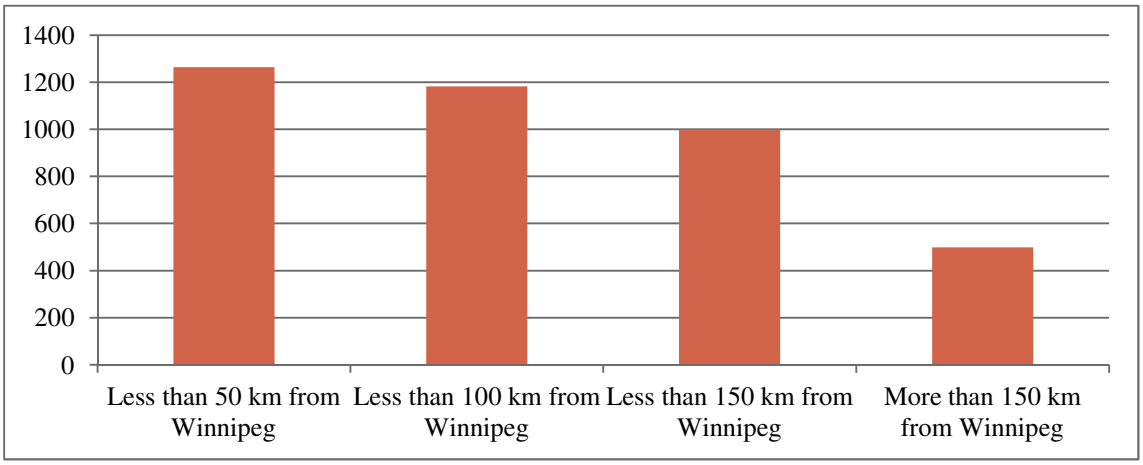


Figure 38 - Cost of farmland in Manitoba, By Distance to Winnipeg (2006)

Finally, aspiring farmers suggested that it is a challenge finding appropriate and affordable land for local, sustainable food production. Land is regularly sold in portions (i.e. quarter sections), well beyond what a small scale producer could afford or need. Meanwhile the local, sustainable market has not yet reached a level of demand that would support farming on a larger scale. Additionally, land closer to Winnipeg, Manitoba's major market, is far more expensive than land further away, due to a variety of factors including fertile soils, residential housing demand, and close proximity to markets. Often, participants in the local, sustainable food economy, especially new entrants, are entering into alternative land holding arrangements, including partnering with existing farmers or retiring farmers to access land. These innovative arrangements can reduce one barrier to entry, although can be less stable and secure than purchasing land.

CHALLENGES CONCLUSION

A local food economy cannot, in the long term, be driven by passion alone. While local, sustainable farmers enjoy social, environmental, and community benefits, many farmers may not be able to continue farming without sustainable economic structures. Infrastructure gaps in processing, distribution, and storage limit farmers' ability to sell their products or to grow their operation if they desire. These gaps also limit consumers' or institutions' opportunities to consistently and conveniently purchase local products. Addressing these gaps will be essential for growth in the local food economy, such as significant expansion into institutional markets.

Many of the challenges that have been highlighted are 'chicken and egg' situations. If there is no market there will be little processing, distribution, or storage infrastructure. If there is little processing, distribution, or storage infrastructure the market cannot grow. Innovative solutions, and possibly some risk taking, will be required to overcome such challenges.

Unfortunately, the challenges identified in this document are not new ones. A report completed in 1946 studying local food distribution in Winnipeg made several of the same recommendations that are identified in this assessment. Supporting the local food economy, it said, required an adequate central market, sufficient cold storage and greater co-operation between marketing groups.[70] The challenges then – distribution and storage infrastructure and co-operation to improve marketing – remain challenges today. Yet, while the challenges are seventy years old, we are now uniquely situated to address them. Shifting public discourse, increased interest in environmental sustainability, and support for the local food economy have created new possibilities for addressing longstanding challenges and make a new food economy possible.

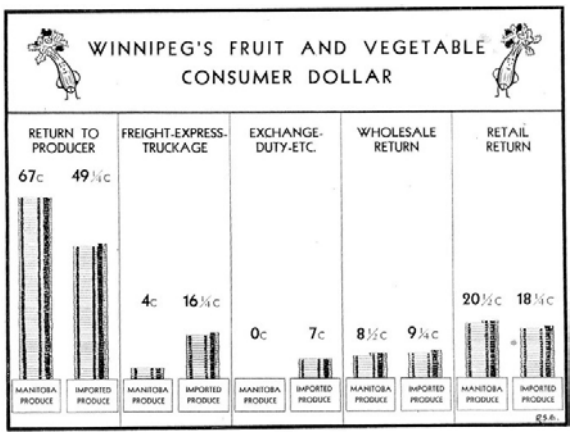


Figure 39 – Where the consumer food dollar went in Winnipeg in 1946

A VISION FOR THE FUTURE

There are many challenges to be overcome to ensure a bright future for Manitoba's local, sustainable food economy. Fortunately, there is tremendous opportunity in Manitoba for innovative solutions to support and build our local food economy. The following 15 opportunities to support the local, sustainable food economy were identified by people interviewed in this project and are rooted in the experience of stakeholders in Manitoba's food economy. Some of these are short term, immediately implementable steps. Others are longer term visions or items for further study. But all provide opportunities to strengthen and grow Manitoba's local, sustainable food economy.

Developing Policies That Enable a Local, Sustainable Food Economy:

- Develop government food procurement policies that support the local food economy
- Explore ways to facilitate the sale of local, sustainable products (including directly marketed products) within supply managed sectors
- Hold a Manitoba Food Summit
- Develop an association of local, sustainable farmers to advise policy decisions

Supporting Innovation in the Local, Sustainable Food Economy:

- Develop small-scale commercial kitchens in rural communities
- Increase the production of global foods
- Enhance local, sustainable food education

Enhancing Manitoba's Food Infrastructure:

- Increase abattoir capacity
- Conduct a transportation capacity study
- Inventory and increase storage capacity for local, sustainable foods
- Increase the number of farms and farmers

Building a Strong Distribution Network:

- Explore opportunities to increase sales through existing distributors
- Encourage regional farmer distribution or aggregation co-ops
- Create a resource guide to connect chefs and farmers
- Improve capacity for marketing local, sustainable foods

DEVELOPING POLICIES THAT ENABLE A LOCAL, SUSTAINABLE FOOD ECONOMY

DEVELOP GOVERNMENT FOOD PROCUREMENT POLICIES THAT SUPPORT THE LOCAL FOOD ECONOMY

DESCRIPTION: The Province of Manitoba and its many Crown agencies, businesses, and institutions, could take significant steps to support the local, sustainable food economy through food procurement policies. Such a policy could support the local, sustainable food economy by requiring government agencies to purchase a certain percentage of their food locally. This, in turn, could act as a catalyst to encourage investment in local, sustainable food infrastructure by providing a large, long-term stable market for these products. While a period of adjustment would be required for supply to catch up with the demand and for purchasers to become familiar with local options, the gradual implementation of such a policy could have significant benefits for the local, sustainable food economy.

Some have argued that an exporting jurisdiction like Manitoba should not be favouring local foods, as our exports would decline if other jurisdictions followed suit. Others have suggested that local food policies might not be allowable under free trade agreements. The latter argument has been answered comprehensively by Rod McRae, who suggests that there is ample flexibility within existing inter-provincial and international trade agreements to implement local, sustainable food procurement policies.[71] The former argument is also not accurate. Many exporting jurisdictions also promote their own products at home, including most American states. Furthermore, a Manitoba food procurement policy would not require that the province buy only Manitoban products, but would ensure that a portion of its food purchases supported Manitoba farmers. Likely, many products would continue to be imported from other jurisdictions.

A government local food procurement policy could be a major catalyst to support our local food economy, investing government procurement dollars back into our province's agricultural industry, creating jobs, and providing students, patients, and others with high quality Manitoba food products. In turn, these sales could provide the private sector with the stability required to invest in the food processing and distribution deficits identified in this report.

PRECEDENT: Some Canadian municipalities have developed local food procurement policies, as have many American states. For example, state agencies in Minnesota, just south of Manitoba, are required to "make a reasonable attempt to identify and purchase food products that are grown within the state."[72] Indeed 70% of American states (35) have policies to either purchase local food if the same price, pay up to a certain percentage more for local food, or require the state to buy local food if available. This includes smaller states (i.e. Wyoming), northern states with agricultural climates relatively similar to Manitoba (i.e. Montana and Minnesota), and major food exporting states (i.e. California, Florida, and Iowa).[73] This suggests Manitoba is neither too small, too far north, nor too dependent on export-oriented agriculture for a local food procurement policy.

In October 2012, the Government of Ontario introduced a Local Food Act to the provincial legislature. While the act does not include specific targets, it does enable the Minister of Agriculture, Food and Rural Affairs to "establish goals or targets" regarding local food procurement for provincial government institutions and agencies.[74] Previously, Ontario provided $4 million of funding to the Public Sector Investment Fund to promote Ontario food and increase the amount of Ontarian food purchased through municipal, university, school, and hospital food services.

POTENTIAL PARTNERS: Partners could include provincial and Crown agency procurement staff, distributors and food suppliers, certification agencies (such as Local Food Plus) who could confirm that food is local and sustainable, and community agency partners. A government procurement policy regarding local, sustainable food would likely start in pilot project locations (i.e. a hospital, a post-secondary institution, and a Crown corporation) to gather data, determine feasibility, establish reasonable targets, and develop promising practices to share with other institutions.

EXPLORE WAYS TO FACILITATE LOCAL, SUSTAINABLE FOOD WITHIN SUPPLY MANAGED SECTORS

DESCRIPTION: Many producers interviewed for this study affirmed that supply management is important for farmer income. Supply managed sectors are key parts of Manitoba's local food economy, as these sectors, by their nature, mostly produce for local markets. However, some local, sustainable farmers have aspirations to grow their operations beyond current small flock limits to enable them to earn a livelihood from direct marketing but are not able to, or not interested in, growing as large as quota would require. Nevertheless, as consumers seek more foods directly from farmers, and as more small farms seek to increase their production beyond current maximum non-registered levels, there is an opportunity to bring these smaller farms under the supply management umbrella. This is

especially the case as these farmers are seeking alternative, niche markets not currently addressed by the regular quota supply (such as directly marketed products).

This, however, will likely take some flexibility from small farmers to accept increased regulation and the supply management boards to provide either exemptions or differentiated quota. In turn, it would acknowledge a growing consumer interest in specialty production (direct marketed, local, sustainable) while positioning the supply managed sectors in a position to benefit from the growth in this niche market sector. Furthermore, it would enable producers raising specialty products for the local market to have increased income, security and stability, while recognizing they are outside the mainstream distribution system.

PRECEDENT: In Manitoba, some supply management boards have support the development of alternative markets. For example, the Dairy Farmers of Manitoba were important partners in developing Manitoba's organic milk production. The board of the Manitoba Chicken Producers can also approve specialty production outside quota, as long as that market cannot be supplied by current production, has a demonstrated market, a business plan and the producer agrees to comply with food safety and animal care guidelines. The strength of this system is that it does provide flexibility within supply management for alternative market streams, although in most cases, people have not sought these exemptions and instead have maintained small flocks.

The Chicken Farmers of Saskatchewan have recently developed a specialty class registration system, enabling producers of organic, halal, free-range, and pasture-raised chickens to apply for a quota exemption of up to 4,000 chickens. Interested producers apply to the marketing board annually and pay a small fee. Chickens must be sold at the farm, farmers' market, or by direct consumer orders. There are some limits to the number of farmers who can participate, as it is limited to 1.5% of Saskatchewan's total allocated base quota less the previously existing Communal Group Production Exemption. As the application process is quite accessible (a brief two-page application) it is quite an open process for people interested in producing additional birds. This exemption is an excellent example of how supply managed sectors can enable farmers to benefit from niche markets.

A study from British Columbia's Farm Industry Review Board suggested that specialty production should be "managed using a distinct and restricted class of quota" and that small producer exemption levels should be increased. Specialty producers, it recommends, "may need to establish supply chain relationships independently and outside the mainstream market access channels" while the supply management boards have traditionally focused on the mainstream market.[75] BC is a different kind of market than Manitoba as it has a larger population and demand for specialty products. However, these proposals do demonstrate that supply management can prosper alongside small specialty markets.

POTENTIAL PARTNERS: This action would require the active participation of Manitoba's supply managed industries, as well as farmers interested in producing clearly differentiated specialty products.

HOLD A MANITOBA FOOD SUMMIT

DESCRIPTION: A Manitoba Food Summit would be an opportunity to develop strategies to support Manitoba's local food economy by bringing together multiple stakeholders including the farming sector, processing industries, retailers, restaurants and institutions, government, academics, non-profit sector, First Nations, and others. This forum will provide an opportunity for an exchange of ideas and vision regarding building Manitoba's local food economy and be a step towards the development of a provincial food strategy. Unlike other initiatives that are rooted in one sector or another (i.e. within the non-profit sector, government, or the private sector), a Food Summit is intentionally multi-sectoral, and brings together diverse voices for the purpose of creating a more effective and implementable strategic vision. In this way, a Food Summit could have significant value by building connections, awareness, and collaboration to implement strategic directions identified by the Summit.

PRECEDENT: Food summits have been held across North America at the local, regional, and state/provincial level. Of particular interest in the Manitoba context is a food summit that was held in 2011 in Saskatchewan. An important outcome of this event was to "initiate collaboration among stakeholders within the food chain, essential to establishing and implementing actions needed to accomplish the vision of a provincial food strategy."[76] This summit was a first step that sparked strategic planning to build and enhance Saskatchewan's local food economy. Since a food summit was quite successful in a province with a similar agricultural economy to Manitoba's, a food summit would be an opportunity to bring stakeholders together to further build our local food economy.

POTENTIAL PARTNERS: Partners in a Manitoba Food Summit would include a diverse spectrum of stakeholders as outlined above. The key to a food summit is its multi-sectorality and it would not be successful without the participation of stakeholders from numerous sectors. Consequently, it would need to be organized and facilitated by a partner or partners who can draw together these diverse stakeholders.

DEVELOP AN ASSOCIATION OF LOCAL, SUSTAINABLE FARMERS

DESCRIPTION: Several of the farmers that participated in this consultation process indicated that they faced challenges dealing with policy issues. While the exact policy concerns differed between farmers and between agricultural sectors, the nature of the

concern was similar: that agricultural policy decisions are made to advance the interests of export-oriented agriculture. In many ways, this makes a lot of sense. Export agriculture accounts for the vast majority of Manitoba's agricultural production. Yet, if local, sustainable food production is going to become a reality in Manitoba policies will need to be developed that advance (or at least not hinder) local, sustainable production.

Developing an association to speak on behalf of local, sustainable farmers would provide a voice for these policy concerns. This could better equip local, sustainable farmers to articulate and advocate on policy issues that matter to them and provide better advice and feedback to the provincial government.

Currently, however, there is no representative body of farmers producing primarily for local production. There are several reasons why this might be the case. Many farm organizations are sector based and the local, sustainable food economy stretches across many sectors. This diversity may also inhibit agreement between local, sustainable farmers. Third, many of these farms are small and may not be able to pay dues to such an organization. Finally, financial viability could be a challenge for any new organization, similar to challenges faced by other small agricultural associations.

PRECEDENT: Just south of Manitoba, the Sustainable Farming Association of Minnesota supports networking between farmers as well as research and policy development. Other policy related organizations exist in several American states. Interestingly, in British Columbia, a Small Scale Food Processors Association represents the interests of small food processors primarily marketing locally, including advocating for policies and providing training of value to small scale farmers.

POTENTIAL PARTNERS: Local, sustainable producers would be the key potential partners for any such organization. Likely, initial funding would be needed to support the development of the organization. In the long-term such an association could prove to be a valuable voice in decision making processes, providing feedback and advice to the provincial government regarding the effect of policies on local, sustainable farms.

SUPPORTING INNOVATION IN THE LOCAL, SUSTAINABLE FOOD ECONOMY

DEVELOP SMALL-SCALE COMMERCIAL KITCHENS IN RURAL COMMUNITIES

DESCRIPTION: Access to commercial kitchens can be a barrier for new entrants to food processing. Developing a network of small-scale commercial kitchens would enable food entrepreneurs across the province to develop and produce their products in safe facilities at an affordable rate.

Several participants were interested in a model currently being piloted by MAFRI in Swan River. The recently upgraded commercial kitchen in Swan River provides an opportunity for food entrepreneurs to develop and test their products. It was suggested by project participants that facilities could be developed in communities across the province so that rural food entrepreneurs in other regions could access an inspected kitchen to produce their product. This would enable them to sell their product more easily while also potentially giving them access to equipment they could not afford for their own small operation.[77] Regional kitchens would also improve food safety by ensuring that foods are produced in certified facilities. Furthermore, these kitchens could incubate and support food processing businesses, creating jobs in rural communities and adding value to agricultural products.

PRECEDENT: Manitoba has made strong contributions to support food entrepreneurs, including the Food Development Centre and the pilot commercial kitchen in Swan River. There are 'incubator kitchens' in other jurisdictions as well. For example, Ontario is home to three incubator kitchens: the Toronto Food Business Incubator, the Niagara Presents Incubator Kitchen and the Friendly Kitchen.[78] In British Columbia, some non-profit organizations have received funding to develop community commercial kitchens. Yukon Territory's Agriculture Development Initiative includes funding for a variety of projects to support economic development and contribute to sustainability in rural communities, including agricultural infrastructure such as processing kitchens.

POTENTIAL PARTNERS: The Province of Manitoba would be a key partner for the development of small incubator kitchens. Another potential partner could include regional or local economic development organizations, as these kitchens could support entrepreneurs in rural communities. Other partners could include non-profit organizations to organize, administer or publicize these facilities, entrepreneurs and/or farmers to use the facilities, and local organizations in rural communities who have kitchen space that could be enhanced for such a facility.

PRODUCE GLOBAL FOODS IN A LOCAL FOOD ECONOMY

DESCRIPTION: Manitoba is home to newcomers from around the world. Since 2007, 67,463 new permanent residents have settled in Manitoba. Most of these (52,332) came to Winnipeg, nearly 5,000 to Brandon and the remainder settled throughout the province.[79] Additionally, Manitoba is home to approximately two thousand temporary workers annually and a similar number of international students.[80] The Asia-Pacific region is the source of most newcomers to Manitoba (51% over the past ten years), followed by Europe (21%) and Africa (20%).[81] As people come from around the world they also bring with them a desire to eat foods they know from their home countries.

This provides an exciting opportunity for Manitoba farmers. The foods that newcomers seek are imported from around the world, but are not as fresh as people are accustomed to. Often imported greens and vegetables are expensive and low quality. Interestingly, our soils and climate provide excellent growing conditions for many of these vegetable crops. It is entirely feasible for Manitoba farmers to produce many of the kinds of vegetables that people eat in Asia, Africa, and Latin America.

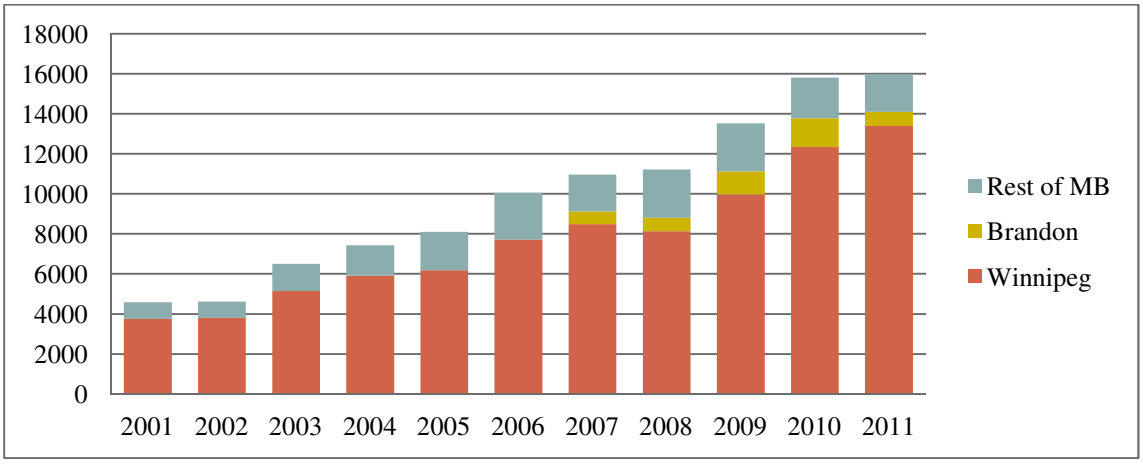
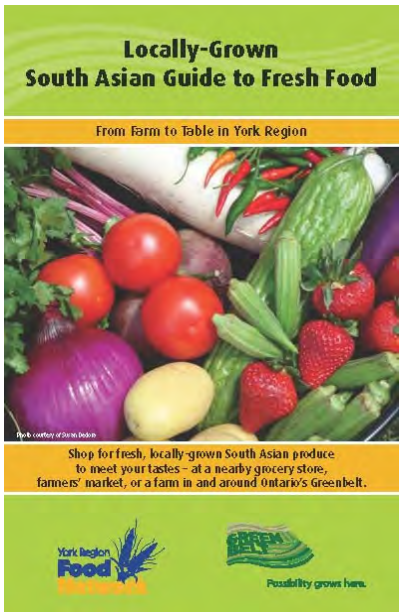


Figure 40 - New Permanent Residents in Manitoba, By Community Destination, By Year (2001-2011)

Similarly, the halal market is a growing niche that provides additional opportunities for Manitoba producers. Manitoba has a growing Muslim population that is seeking halal meat. Products like goat and lamb are predominantly imported from New Zealand and other distant locales despite production here in Manitoba. Manitoba farmers can produce a fresher, tastier product, while selling local, sustainable meat products to the halal market. Furthermore, there is a growing market for halal products outside of Winnipeg, particularly in Brandon, which has experienced significant immigration in recent years.

What needs to happen to make this possible? First, farmers need to try to grow some of the new crops being sought from around the world. Secondly, consumer education needs to be done with the newcomer population to highlight the possibility of sourcing foods from local Manitoba farmers rather than importing them from elsewhere. Third, infrastructure needs to be established to facilitate these sales, such as expanded capacity for halal slaughtering in Manitoba, much of which currently occurs outside inspected facilities.



PRECEDENT: Canadian farmers are just beginning to realize the potential of local, sustainable food sales to the world food market. For example, in Ontario, the Greenbelt Foundation has recently produced guides to locally grown South Asian, Middle Eastern, and African/Caribbean foods.[82] The guides include foods such as egg plant, okra, bok choy, a variety of greens, and halal meat products. British Columbia is working to connect local meats with the large Asian Canadian population. While Manitoba does not have a market for global foods approaching the size of Ontario or BC, there are likely opportunities here to be explored as well.

POTENTIAL PARTNERS: Partners include local farmers, distributors to distribute food, and ethnic food stores that serve the ethnic food market. Meat products would also require the involvement of abattoirs to slaughter in a halal manner. MAFRI has a halal food specialist that could support efforts to explore the local halal meat market.

ENHANCE LOCAL AND SUSTAINABLE FOOD EDUCATION

DESCRIPTION: Many participating farmers expressed the concern that people do not know what farms are actually like. To remedy this situation, many came to the same conclusion: it is important for urban children and youth to visit farms so that they have an opportunity to see farming practices for themselves. Having children visit farms was a reoccurring theme raised by many farmers. Farmers enjoyed these visits and thought they were important for educating urban children about food production. However, they did indicate that there was significant red tape for schools interested in coming to visit a farm.

While farm visits are optimal, especially for younger grades, a suggestion from a recent Food Matters Manitoba Farm to Cafeteria program was for farmers to visit schools, particularly if products from their farms are being served in a school cafeteria or being used in Home Economics or Culinary Arts classes. This would give students a personal connection to the food that they are cooking and/or eating, and help students understand and value the hard work that goes into food production. While this would require farmers to provide their time, it could also develop long-term connections and interest in purchasing local, sustainable products.

Many farmers were open to welcoming people to their farm and showing them their operation. Given the challenges outlined above regarding consumer awareness, getting people out to farms, whether it is through Open Farm Day, school field trips or other farm visits is one tool to raising awareness of the realities of farming in Manitoba.

PRECEDENT: Many schools already visit farms and there are educational programs in Manitoba funded by agricultural commodity groups and others to teach Manitoban children about farming. These programs include Ag in the Classroom and Crops in the Classroom. Many commodity groups also provide educational resources for teachers. In addition, several schools have incorporated growing food into the curriculum, to give students first-hand experience growing and eating fruits or vegetables.

If local, sustainable agriculture is going to thrive in Manitoba, it is important that students are made aware of it and are introduced to the ideas of buying local foods. Food Matters Manitoba programs such as Farm to Cafeteria and the Localvore Iron Chef Cookoff Competition are examples of projects that have made the connection between students and Manitoba farmers, enabling students to think about and experience local foods in Manitoba schools.

POTENTIAL PARTNERS: Potential partners include farmers (to host children or others on their farm), schools and school divisions (who are able to send children to farms on school trips), and provincial departments such as Education (regarding curriculum development) and MAFRI (Open Farm Day). Existing agricultural resources provided by Ag in the Classroom and agricultural commodity organizations also have important roles to play in developing and supporting public education regarding agriculture.

INCREASE ABATTOIR CAPACITY

DESCRIPTION: Nearly all of the meat producers that participated in this project highlighted the need for increased abattoir capacity. Most were either located far from an abattoir or only had a single abattoir in their area. Some farmers also had a difficult time finding processors for their meat products if they raised animals other than pigs and cattle.

Despite apparent concerns regarding this infrastructural deficit, the solutions are unclear. It is unclear, for example, that the small size of Manitoba's local, sustainable food economy could support much more abattoir capacity than currently exists. There are reasons why abattoirs have closed in recent years. Would investments in creating new local abattoir capacity actually hurt existing abattoirs by drawing business from them to new entrants?

Participants agreed that developing abattoirs was a role of the private sector. It was suggested, however, that the provincial government or other organizations could support the development of new abattoirs, particularly if there are niche markets currently going unmet due to a lack of processing capacity. Abattoir development and retention can also be supported through regulatory frameworks that enable the success of locally focused abattoirs while maintaining food safety. Funding, it was suggested, would be justified because the lack of processing infrastructure limits farmers' ability to sell their product, restricting potential market growth. Furthermore, investing in processing capacity creates jobs in rural communities.

One idea that was suggested by several farmers was a mobile abattoir. Mobile abattoirs are not cheap. In other jurisdictions, the initial capital cost was approximately $200,000. Careful analysis of the feasibility of a mobile abattoir in Manitoba would be required before this option could be considered here. However, it could provide a facility for specialty animals or animal species underserved by existing slaughter capacity.

Other proposed ideas including subsidizing the costs of adapting to new food safety regulations as they are introduced to reduce the risk of losing existing abattoir capacity due

to regulatory changes and providing supports to abattoirs to increase their processing or marketing capacity.

PRECEDENT: As identified above, a mobile abattoir was one method proposed to increase abattoir capacity in Manitoba. Mobile abattoirs have been used in other regions with limited processing capacity including BC, the Yukon, and Alberta. The abattoir is located on a truck which can then be driven to farms and processing completed on the spot. This cuts transportation costs and time for farmers, reduces pre-slaughter animal stress, and can be used to slaughter a wide range of animals (which would be beneficial for specialty livestock industries). Another benefit is that a mobile abattoir could service multiple regions of the province, rather than a fixed site which could best service only nearby farmers. In other jurisdictions the price of using a mobile abattoir for the farmer are similar or slightly higher than regular abattoir fees, although the farmer also saves on the cost of transportation. In some cases, the costs of mobile abattoirs have been subsidized, while others have operated using a co-op model or as a private enterprise.[83]

POTENTIAL PARTNERS: The private sector will have to lead the development of traditional abattoir capacity in Manitoba. However, there could be support from the provincial government to help establish or retain businesses. Other potential partners will need to be purchasers (whether individual consumers, food retailers, restaurants or institutions) and farmers interested in having their animals processed at an abattoir. Potentially an agricultural producers group would also be a potential partner.

If a mobile abattoir was deemed to be feasible for Manitoba, several key partners could participate in the project. Partners for a mobile abattoir could include the provincial government, farmers and agricultural organizations, and possibly an academic institution (in Alberta, the abattoir was a project partnered with Olds College). Some mobile abattoirs have been successfully operated as private enterprises, although given the small size of the Manitoba market and lack of initial capital, this is unlikely in Manitoba.

CONDUCT A TRANSPORTATION CAPACITY STUDY

DESCRIPTION: Every day, trucks from Winnipeg are used to ship goods across the province. Indeed, 95% of goods moved within Manitoba depend on trucks.[84] Often, however, these trucks come back at least partially empty. Since distribution is one of the major challenges that was expressed by farmers in this study, it was suggested that a transportation capacity study could explore the capacity for Manitoba's existing trucking industry to transport local, sustainable foods to Winnipeg as back haul. The potential for using existing transportation infrastructure is unknown but could be a win-win situation. Farmers would gain easier access to the Winnipeg marketplace and would only have to

transport food to regional drop-off points far closer than Winnipeg. Truckers would benefit by earning money on their return trip to Winnipeg, who would then deliver food products to an existing distributor or storage location.

POTENTIAL PARTNERS: Potential partners could include the trucking industry, academics (for example, the University of Manitoba Transport Institute), MAFRI, and farmers. The implementation of any plan would require the involvement of a food distributor to store and market food being sent to Winnipeg.

INVENTORY AND INCREASE STORAGE CAPACITY FOR LOCAL, SUSTAINABLE FOODS

DESCRIPTION: Storage for local, sustainable products is essential for farmers to increase their sales in Winnipeg by having a consistent supply available for purchasers and being able to sell further into the winter months. As identified in the challenges section, farmers have had difficulty finding adequate storage facilities. It was suggested, however that there may be food storage capacity in Winnipeg that is underutilized. Existing food-related organizations and businesses with food storage capacity could be explored, along with determining the possibility of using warehouses not previously used for food products when it is safe and feasible to do so. Consequently, it was suggested that a focused storage inventory would be a first step towards addressing storage challenges for Manitoba farmers. Secondly, it may be necessary to increase the storage capacity for local, sustainable foods, particularly in Winnipeg, if the inventory does not reveal adequate available storage capacity.

PRECEDENT: Newfoundland and Labrador supported the development of its fruit and vegetable industry through a Fruit and Vegetable Storage Assistance Program, which provided up to $20,000 to enable horticultural producers to expand, upgrade, or construct storage, cleaning, and grading facilities.[85] While improving on-farm storage infrastructure would be valuable for some farmers, more farmers were interested in a central storage location to enable them to sell products more easily (particularly if their farm was located far from Winnipeg).

POTENTIAL PARTNERS: It was suggested that an entrepreneur could develop a food storage business and that the private sector was best positioned to respond to the interest in a storage facility. Farmers would need to pay for this service, although the ability to sell to

additional markets could off-set this cost. Alternatively, existing organizations, distributors, and/or businesses with available storage space could be identified for interested farmers to procure storage space. Partners could also include academics and/or non-profit agencies to do market research and determine existing storage capacity.

INCREASE THE NUMBER OF FARMS AND FARMERS

DESCRIPTION: Many sectors of the local food economy cannot keep up with demand for their product. Nearly all participants in this project suggested that demand will increase in coming years at least in the short-term and, many suggested, in the long-term as well. This will require more farmers to meet the demand, whether that is new entrants to farming or farmers shifting their operation to meet local market demands. The local, sustainable food economy has demonstrated that it can be a less capital and land intensive way for new entrants to become involved in farming, although access to both land and capital remains a challenge for new entrants. Increasing the number of farmers in order to increase the supply of local foods would also increase the number of young farmers in Manitoba and contribute to the vitality of rural Manitoban communities.

It is not possible to simply create farmers. But it is possible to provide supports that enable people to become farmers. Programs such as Manitoba Farm Mentorship can play an important role in providing aspiring local, sustainable farmers with the skills necessary to develop their own farms.

It is important to be somewhat careful when increasing the supply of local, sustainable foods available to ensure that the increased supply does not outpace increases in demand. Farmers in some sectors indicated that there was room for growth in their sector, but suggested that if too much supply was produced it would erode the local, sustainable premium that they currently benefit from.

PRECEDENT: To support its agricultural future, Yukon Territory has developed an Agriculture Internship and Mentorship program that provides wages for agricultural internships (up to eight weeks) and mentorships (up to 25 weeks). This provides new farmers with an opportunity to work with more experienced farmers. In Manitoba, the

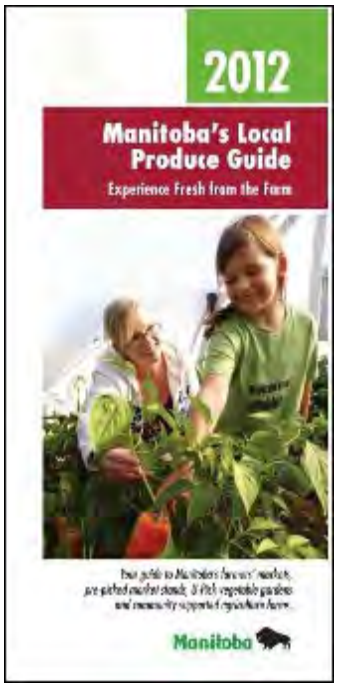
Manitoba Farm Mentorship, a program affiliated with the Harvest Moon Society, program has already been providing training and mentorship opportunities for new and aspiring farmers, including 12 long-term interns, five short-term or part-time interns, and 35 workshops, courses, and tours.

POTENTIAL PARTNERS: Initiatives to provide support for new local, sustainable farmers are best supported by community agencies with experience providing mentorship support to new farmers, such as Manitoba Farm Mentorship. The provincial government and other funders can support this investment in Manitoba's rural economy with financial support. Any programs to train and support new farmers would also need to involve people interested in an agricultural career.

BUILDING A STRONG DISTRIBUTION NETWORK

CREATE A RESOURCE GUIDE TO CONNECT CHEFS AND FARMERS

DESCRIPTION: Several chefs indicated that they would be interested in purchasing more local or local, sustainable food but were not sure where they could buy it and did not have the time to search for it. Conversely, several farmers suggested that they would be interested in selling to local restaurants or institutions but were not sure who they should contact to sell their product.



A suggested solution to this challenge was a resource guide for chefs and farmers to find each other. There are already resource guides for individual consumers looking for local products, but the farmers able to or interested in selling to institutions or restaurants can be different than those able to sell to individual customers. Selling to larger institutions or restaurants requires that a farmer have adequate volume and distributional capacity. A guide would identify those farmers that have the supply required to sell locally and identify what kinds of items they have for sale. This would make it easier for purchasers to identify and contact farmers if they wanted to procure local products.

For farmers the guide would provide the contact information for purchasers at institutions and restaurants looking to purchase products locally. This way, farmers can focus their marketing efforts on potentially interested clients. Farmers talked about having difficulty knowing who to contact in larger institutions so the guide could let farmers know who was responsible for purchasing.

Since the local, sustainable food economy is changing rapidly, the guide would need to be updated regularly. Assuming that current trends continue, more and more restaurants and/or institutions will be looking for local products. Similarly, there may be new farmers or existing farmers offering new products to add to the guide. The guide, therefore, could have a print version but be regularly updated online to ensure that chefs and farmers have accurate information.

PRECEDENT: A resource from Ontario, www.ontariofresh.ca, provides a marketplace for farmers to sell products and for purchasers to identify and buy food. While the interactivity of the Ontario Fresh model is expensive to develop and maintain, a resource guide could serve much the same function at a lower cost, by connecting potential buyers and sellers. If

the guide is updated frequently, businesses and farmers could maintain relatively up-to-date information.

POTENTIAL PARTNERS: MAFRI's Knowledge Centre would be best positioned to develop and maintain such a directory. Users of the resource, including restaurants, institutions, farmers, processors, and local distributors would also be potential partners for the development of the resource. It could be promoted through industry associations, non-profit organizations, and by MAFRI.

IMPROVE CAPACITY FOR MARKETING LOCAL, SUSTAINABLE FOODS

DESCRIPTION: Many farmers identified consumer awareness of their product as one of their challenges. Several talked about relatively unsuccessful marketing experiences using radio or newspaper advertisements. At this point, many rely largely or exclusively on word of mouth marketing. To grow the local, sustainable food economy consumers need to know how they can purchase local products.

As identified in Challenge 7, a growing number of Manitoba farms and small-scale processors have websites. Many, however, do not, or their websites could not be easily updated or are not user friendly. Several people who were interviewed said that one way that they would like to improve their marketing is through a new or improved website. This, they believed, was an important way to improve consumer awareness of their product and increase sales.

Consequently, one way to support the local, sustainable food economy would be to support marketing activities and training. In particular, this could include the development of websites and building the capacity of farmers or processors to maintain and update these sites. This would give farmers an additional marketing tool to market their product, a way to communicate with customers, and build their sales, whether directly to consumers or to institutions, restaurants, or other larger purchasers.

PRECEDENT: There are examples from other parts of Canada of how support has been provided to enable local, sustainable producers and processors to improve their marketing. For example, the Agri-Food Market Development Program in New Brunswick and Prince Edward Island provided funds to develop signage, promotional materials, and build

marketing capacity.[86] The Direct Marketing Community Development Trust in Nova Scotia not only supported marketing for local food products, but was also used to support infrastructure development for farmers' markets, expand value added processing, and funded the launch of a community supported agriculture venture.

POTENTIAL PARTNERS: The Province of Manitoba could provide funding for marketing support in consultation with local, sustainable farmers and processors. Organizations providing training for farmers could include marketing and website development as part of that training.

SELL MORE PRODUCTS THROUGH EXISTING LOCAL AND SUSTAINABLE FOOD DISTRIBUTORS

DESCRIPTION: For the local, sustainable food economy to grow and attract larger customers such as institutions and restaurants, it will be necessary for farmers to use distributors to market more of their product. As a study from the University of Wisconsin-Madison indicates, "aggregation is a key ingredient for scaling up local and regional food systems."[87] This will enable Manitoban farmers and processors, especially those producing at a smaller scale, to reach larger marketplaces than they could reach individually. Distributors can also provide at least a partial solution to infrastructural challenges such as storage space and transporting food products. Fortunately, Manitoba already has distributors that work hard to sell local, sustainable food. This gives farmers access to infrastructure and distribution networks that they would not necessarily have by direct marketing their product.

Aggregating can have its challenges. It does mean a reduced farmer-consumer connection. It also does come at a cost to farmers, although it does relieve them of the expensive and time consuming burden of distribution. Distribution is not for all farmers. But many farmers could benefit from increasing their sales through the existing local, sustainable distribution networks in Manitoba.

Several farmers expressed their support for Manitoba's existing local and sustainable food distributors. Rather than reinvent the distribution process, there is some existing infrastructure and experience in Manitoba to distribute local and sustainable food. These resources can be important components of building the local, sustainable food economy.

PRECEDENT: An example of the possibilities of Manitoba-based distributors for local, sustainable foods was demonstrated through the Local Sustainable Produce Value Chain, which connected four fruit and vegetable producers, a local produce distributor, the University of Winnipeg, and Vita Health Fresh Market. This value chain enabled these purchasers to better access local, sustainable foods through a value chain facilitated by Fresh Option Organic Delivery.[88]

POTENTIAL PARTNERS: Manitoba's two distributors that currently market local, sustainable foods are Fresh Option Organic Delivery and World Wise Distribution. Both of these provide opportunities for Manitoban farmers to sell their food products locally, particularly to larger purchasers such as restaurants and institutions. While larger distributors do carry some local products, these are few because of the large volume needed and distributor requirements.

DEVELOP REGIONAL FARMER DISTRIBUTION OR AGGREGATION CO-OPS

DESCRIPTION: To address the distribution inefficiencies of the currently local, sustainable food economy several participants suggested that a farmer-run distribution or aggregation co-op would reduce the time and fuel used to transport food products, while making ordering easier for consumers. By acting cooperatively, some farmers suggested that they could attract more (and bigger) customers, sell a greater diversity of products, reduce travel time, and collaboratively invest in needed infrastructure such as storage.

Several components would be required to enable a food distribution co-op to maximize its potential for farmers. These include distribution (access to appropriately sized trucks, including refrigerated trucks), sales infrastructure (i.e. online sales mechanism), delivery system (i.e. consumer pick-up from central locations, drop-off points, a store front, or other options), and possibly storage (to maintain constant supply in Winnipeg, particularly for institutional or restaurant purchasers). Likely a staff person (or staff people) would be beneficial to coordinate these activities, although this adds to costs.

Rather than operating a full-fledged distribution network, another option might be regional aggregators, which could gather product from a particular region and provide this product to an existing distributor. While this would add an additional stage between farmer and consumer, it could also increase the quantity of product available, enable farmers and distributors to access larger contracts more easily, and could address infrastructure concerns at a local level (such as storage facilities).

That said, some farmers interviewed were not interested in participating in such a co-op. For many, selling directly to consumers was what interested them in their model of agriculture. Similarly, farmers worried that by selling alongside other farmers, the distinguishing features of their product could be lost. Some farmers said that they worked hard to maintain

certain production standards and were concerned that other farmers might not be interested in maintaining those standards or followed different farm practices. Third, there was a concern expressed that any new enterprise should not take away from existing distributors and distribution networks, who have worked hard to support the local food economy. Indeed, a co-op model may be less favourable than more fully utilizing existing distribution capacity for local, sustainable products in Manitoba, particularly since these business already have experience and infrastructure for local distribution.

Financing a co-op might be difficult, particularly given the tight margins with which many farmers operate. There are financial supports for developing co-operatives as well as other funders that may be able to assist with some of the initial capital expenses. The co-op, however, would eventually need to be self-sufficient, earning enough income from its operations to cover expenses. Would farmers who hesitate to pay for distribution now be willing or able to pay a co-op to do it for them?

While there are examples of successful, self-sufficient local food distribution co-operatives, some (i.e. Red Tomato in the US) have decided to operate as a non-profit organization instead, and cover a portion of their expenses through government and foundation grants due to the small margins available from local food sales.[89] It is not clear that a farmer or local food co-op could operate in Manitoba without the support of volunteers and/or grant funding. Further research would be needed to assess a co-op's feasibility.

PRECEDENT: There are several examples of farmer distribution co-ops. Often food distribution co-ops include farmers and consumers. Some facilitate the sales of products through virtual marketplaces. Farmers bring in their products on the sale day, but know how much to bring because products have been pre-purchased (i.e. Niagara Local Food Co-operative).[90] Other models aggregate food to reduce distributional inefficiencies for farmers. For example, the Food Roots Co-op in Victoria includes farmers along with organizations and individuals. It has a warehouse for storage and a refrigerated van to pick up and deliver produce to pocket markets throughout Victoria.[91]

POTENTIAL PARTNERS: Partners would include farmers, existing food distribution co-ops (i.e. Harvest Moon Local Food Initiative), provincial government staff pertaining to agriculture and co-op development, and, depending on the co-op model, other potential co-op members (consumers, organizations, etc).

OPPORTUNITIES SUMMARY

Opportunity	Challenges Addressed	Potential Benefits
Develop government food procurement policies that support the local food economy	Purchaser Requirements, Regulations and Policy	Provide a large market for local, sustainable foods Provide a stable market that enables people to invest in infrastructure
Explore ways to facilitate the sale of local, sustainable products within supply managed sectors	Regulations and Policy	Enable small-scale producers to earn a livelihood selling supply managed products without challenging a structure that is working for farmers Increase consumer access to products
Hold a Manitoba Food Summit	Purchaser Requirements, Consumer Awareness, Regulations and Policy	Involvement of diverse stakeholders Coordinated action to develop local, sustainable food economy
Develop an association of local, sustainable farmers to advice policy decisions	Regulations and Policy	Provide coordinated voice for local, sustainable farmers Enable easier participation in policy discussions of direct relevance to smaller producers
Increase abattoir capacity	Processing, Supply/Demand	Increase availability of local meat products Reduce transportation and processing costs for farmers Enable farmers to sell more product knowing that processing capacity is in place
Conduct a transportation capacity study	Distribution	Identify ways for farmers to benefit from existing transportation infrastructure Lead to reduced transportation costs for local food products
Inventory and increase storage capacity for local, sustainable	Distribution	Identify existing storage infrastructure that could be used by local, sustainable

food products		producers Increase ability of producers to extend their sales season Increase ability of producers to sell to markets further from their farm
Increase the number of farms and farmers	Supply/Demand	Increase the amount of local food available in Manitoba Use the local, sustainable food economy as a way to promote and grow rural communities
Develop small-scale commercial kitchens in rural communities	Processing, Regulations and Policy, Supply/Demand, On-Farm Barriers	Enable rural entrepreneurs to test products to sell Provide access to commercial kitchen facilities to increase access to markets and processing capacity without the high cost of developing a facility Provide a community space that supports rural community vitality
Increase the production of global foods	Supply/Demand	Provide a new market for farmers Address growing consumer demand for global foods as newcomer population in Manitoba rises
Enhance local, sustainable food education	Consumer Awareness, Price, Marketing	Increase consumer awareness of realities of local, sustainable food production Increase consumer awareness of benefits of local, sustainable food production Increase consumer awareness of how to access local, sustainable food products
Explore opportunities to increase sales through existing distributors	Distribution, Marketing	Support existing businesses dedicated to local, sustainable products Benefit from existing expertise and infrastructure Reduce time required for marketing and distribution by producer
Encourage regional farmer distribution or aggregation co-	Distribution, Marketing	Reduce inefficiencies in marketing and distribution at a regional level

ops		Provide new access to local (rural) markets Enable farmers to sell to larger customers or to more easily sell to existing distributors
Create a resource guide to connect chefs and farmers	Purchaser Requirements, Marketing	Increase chef awareness of availability of and how to access Manitoba foods Increase farmer awareness of which institutions and restaurants are looking to purchase local, sustainable foods
Improve capacity for marketing local, sustainable foods	Marketing, Consumer Awareness	Provide farmers with necessary tools to implement more effective marketing campaigns Increase consumer awareness of availability of local food products

CONCLUSION

The opportunities outlined in this report are steps towards achieving a local, sustainable food economy in Manitoba. Not all are of the same scope. Some our initial steps – feasibility studies or small projects. Others are long term visions that could take years to come to fruition. All of these action steps, however, contribute to the common vision of a strong local, sustainable food sector in Manitoba. They are the key priorities identified by the participants interviewed in this study.

Nearly all of our interviewees said that the future looks bright for local food. There is significant opportunity for this new food economy to create jobs and investment in rural communities and enhance Manitoba's environmental sustainability. But, as this report has indicated, we have a long way to achieve this potential.

To get there, we have to overcome longstanding barriers that have limited the local, sustainable food economy such as processing, distribution, and transportation infrastructure. These are not new problems, but we have new potential solutions based on intersectoral collaboration, and partnerships between farmers, the private sector, non-governmental organizations, the provincial government, and newly engaged consumers.

To grow our local, sustainable food economy, Manitoba will have to build on the creativity and passion of those growing, selling, and making local, sustainable foods. Those involved in the local, sustainable food economy have already demonstrated how much can happen even with limited resources. Manitoba has a tradition of innovation, a tradition that we will need to draw on if we are to overcome the challenges that the local, sustainable food economy faces.

Finally, to grow the local, sustainable food economy we will need the partnership of many sectors – farmers to grow the food and invest in their operations; institutions who seek out local, sustainable options to serve their clients or students; retailers and restaurants that stock their shelves or their menu with local options; governments that pass enabling legislation or provide strategic supports that enable the local, sustainable food economy to grow and succeed; non-profit organizations who educate consumers and facilitate partnerships. But ultimately, all Manitobans have a role to play if the local, sustainable food economy is going to grow to its full potential whether they choose a local, sustainable option in the grocery store, asking for it in a restaurant, or seek it in their school. It will be in response to this demand that the local, sustainable sector can achieve its full potential in Manitoba.

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