

2013

Stormont-Dundas-Glengarry Regional Food Assessment



By Dana Kittle and Julia Stevens
The All Things Food Network
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Acknowledgements

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The All Things Food Regional Food System Assessment Research Team,

Julia Stevens and Dana Kittle

About All Things Food

Who We Are

All Things Food is an established Community Food Network in SD&G since 2008, composed of over twenty community organizations, institutions, businesses, and individuals. We're committed to increasing access to local, healthy and sustainable food for all residents of SD&G and working with our communities to build healthy and sustainable communities that are food secure.

What We Do

As a Network, we meet on a regular basis to discuss issues and projects related to food security in our communities, to work towards collaborative goals, and to network and build relationships.

We also undertake a variety of food-related projects within SD&G that respond to community needs and increase access to good food for all. These include, but are not limited to: organizing free or low-cost "How to Grow Your Own Food" and food skills workshops; working with schools on Farm-to-School initiatives such as farm field trips and salad bars; coordinating Community Kitchen programming; managing the online SD&G Community Garden Network; operating a garlic social enterprise; providing an online hub and regular communications on "all things food" in SD&G; and raising awareness about the benefits of sustainable food systems through public education and events.



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Assessment Contributors and Sponsors

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Executive Summary

Purpose of the Assessment

The **Stormont-Dundas-Glengarry Regional Food Assessment** was conducted to provide greater insight into SD&G's regional food system, and into the supply of and demand for local and sustainable food from regional producers and processors and major community institutions respectively. A small sampling of restaurants was also included in the research.

Rationale

Introducing a greater amount of local and sustainable food into major institutions and restaurants in SD&G is an opportunity to not only positively influence the health of our communities, but to also provide a major market for and source of income to regional producers, processors, and distributors. Moreover, it has incredible potential to decrease our communities' environmental footprint, create meaningful jobs, invigorate our local economy, and ensure the overall sustainability of our region.

Assessment Overview

The Assessment was a two-fold process and took place from June 2012 through January 2013.

The **first part of the assessment** involved evaluating the demand for local and sustainable food from major institutions in SD&G including high schools (cafeterias and Student Nutrition Programs), daycares, preschools and Early Years/Learning Centres, hospitals, and long-term care centres, and a small sampling of restaurants. At the same time, the capacity of local farmers to meet institutional demand was assessed. Existing linkages between supply and demand were then explored, such as distribution systems, infrastructure, and procurement policies. Finally, a critical analysis of barriers, gaps, and opportunities was conducted and a series of recommendations for next steps toward building a stronger, more sustainable food system were developed.

In the **second part of the assessment**, a series of "Community Food Workshops" were held in each county in SD&G to learn more about each region's specific food system and its community's views on food. The feedback from these workshops is included and commented on in this report.

Low rates of participation in the Community Food Workshops and low survey response rates were both noted throughout the assessment process. This is telling, and though it could be for a wide variety of reasons, we felt that on the whole food security was not a general focus in SD&G.

Profile of SD&G

SD&G is a region with a **rich agricultural foundation**. It holds incredibly fertile soils, some of the best farmland in Canada, a well-established farming culture, and a large number of farms and agricultural industries, with over 1,500 producers producing a wide variety of products. **Agriculture is a significant contributor to the region's economy**, though not as strong as it once was. Recent census data shows a trend toward larger farm sizes, aging farm operators, increasing land inputs, and a low overall number of organic farm operations, though both certified organic and in-transition to organic operations are increasing.

Community Food Issues

Awareness of and poor overall accessibility to local foods, rising food insecurity, and high rates of obesity were all noted issues during the assessment process. Although the region boasts prime agricultural land and assets, and has a thriving agricultural community, it seems that many community members are purchasing the majority of their foods from large supermarkets in the

region. Producers, processors, and distributors in SD&G that were surveyed echoed this trend, stating that they feel local food markets are stronger in Ottawa, and seek out these markets to sell their products out of the region. **With SD&G residents spending an estimated \$1.5 million dollars on food annually, this is a significant amount of money which could be spent within our local food economy.**

Institutional and Restaurant Survey Results

A large and varied number of food suppliers are currently serving SD&G institutions and restaurants, with grocery stores and Sysco food services as the most popular suppliers. The majority of survey respondents relied primarily on large food service companies to supply the bulk of their food needs. Twelve survey respondents or 41% of participants indicated that they currently served local foods produced or processed within SD&G, and **75% of survey participants indicated that they are interested in purchasing more local foods and local food products.** Fruits and vegetables, followed by dairy products, meats and poultry, and eggs topped the list. Respondents stated that they could build flexibility into their current budgets for local foods, ranging between 10-80% of their overall budget.

Organic foods were not as popular among respondents; a very low number of those surveyed respondents indicated that they are currently serving organic foods. **31% of respondents showed interest in beginning to serve or serving more organic foods.**

Institutions mentioned “the seasonality of local foods” and “convenient delivery/distribution services” as the two largest barriers to serving local foods. When asked to provide solutions to increasing local food procurement, the most common response provided was to “**make the connections between institutions/restaurants and local food**” – whether through an online searchable map, a listing of local food suppliers, or other means.

Producer/Processor Survey Results

A majority of conventional producers and processing operations participated in the surveys, with the next most common operation being a non-certified organic farm/business. Direct sales to consumers and grocery stores were the largest sales outlets for survey respondents, followed by sales at farmer’s markets and to restaurants.

84% of survey respondents indicated that they are interested in selling to institutional markets, such as schools, daycares, hospitals, and long-term care centres. Most of these operations are conventional farms or businesses. Of the survey respondents, only three producers/processors currently sell to institutions. Vegetables and herbs, fruits, and meat products were the top local food products that producers and processors are interested in marketing and selling institutions.

Respondents were also asked if there were particular products that they were interested in selling in greater quantities, or scaling up production of; 89% of survey respondents stated yes, with fruits and vegetables, meats, and grains mentioned most often.

Connecting Supply and Demand

Distribution services, infrastructure, and policies in existence in SD&G which could help to connect the supply of local/regional foods with demand from institutional and other markets were analyzed.

Distribution

To our knowledge, **no distribution service currently exists in SD&G which focuses on the distribution of a variety of fresh, frozen, and dry regional and local foods.** Within this niche sector

lies a major opportunity to distribute regional and local foods to major institutions, retailers, and other markets.

When asked about their current distribution services, many local producers and processors indicated that they currently deliver their products themselves to clients, including food services, retailers, and institutions. Producers and processors were most interested in a **food co-operative distribution model** to potentially distribute local foods to institutional markets.

Infrastructure: Aggregation and Processing

In SD&G, there is currently no major infrastructure that exists where a wide variety of local and/or regional foods are aggregated, stored and then distributed to buyers, commonly known as a **local or regional food hub**. Furthermore, to our knowledge, no facility exists within SD&G that processes a variety of local and regional foods and food products.

Procurement Policies

Of all institutions that were surveyed, **none reported having a procurement policy set in place which prioritized buying local/regional foods**, and very few survey respondents indicated that they would be interested a policy. These results are in line with the other survey data collected; few SD&G institutions are procuring many local foods and local food products at the moment, and the majority of local food buying that does take place is on a seasonal or occasional basis, largely due to restrictive budgets, food service contract restraints, and the availability and accessibility of local/regional food.

Challenges and Opportunities in the Regional Food Value Chain

Major gaps in SD&G's regional food value chain that were documented include: 1) the promotion and celebration of local foods in SDG; 2) a regional food distribution service; 3) a regional food hub; and 4) government support for sustainable food systems. **Significant barriers** include: 1) restrictions faced by potential major purchasers of local food; 2) legislations and regulations; 3) SD&G's geography and climate; 4) attitudinal barriers; and 5) a lack of incentives to choose sustainable agriculture as a career.

Strategies for a Stronger, More Sustainable Food System in SD&G

Four strategies to achieve a stronger, more sustainable food system in SD&G were developed by the researchers' of this report, based on what we heard, understood, read, and saw throughout the Assessment process, and on our knowledge and experiences on food issues and projects in SD&G and beyond. These strategies include:

1. The development of an SD&G "Action Plan on Food"
2. Building a stronger regional & local foods network
3. The development of regional food working groups
4. The promotion and celebration of local foods in SD&G.

Reflections

With a growing demand for local foods, local food producers eager to supply markets, pressing community issues related to food, promising ideas from community members on how to grow the local food system, and an established local food network in place, **the time is ripe to focus on food in SD&G**. We must catalyze on the great assets in our region to enable the development and success of a sustainable and resilient regional food system. Food has incredible potential to bring "health, wealth, community, and connection¹", and we must harness its power to bring these benefits to SD&G.

Introduction

“...If food is grown in strict relation to the needs of those who will eat it, if every effort is made to reduce the costs of transportation, to improve storage, to conserve the land, and then, where it is needed, by recycling wastes and water, we will go a long way toward solving many of our environmental problems also...”

Margaret Mead, “The Changing Significance of Food” (1970)

Food has a very important place in society. Not only is food important for our survival and health, but we appropriate special meanings, memories, and cultural and spiritual significance to it. Events and holidays are planned around special meals, and food brings people together. Moreover, food is closely tied to major societal issues including poverty, malnutrition, diabetes, obesity, and food security.

Increasingly in Canada, food issues are coming to the forefront of societal discussions as we realize that the state of our natural environment, economy, culture, and social justice system are strongly connected to food.² Food is no longer viewed as a human right, but as a commodity, and the dominant food system that we rely on in Canada reflects this. Climate change, increasing oil prices, cheap exports, and economic recessions are affecting our food prices and how we source our food. Our grocery stores stock their shelves with products from around the world, despite the fact that many of the same products could be successfully grown in Canada.



A Cornwall garden shared by three families. (Towndrow, 2012)

Demand on food banks in Canada has continued to grow steadily,³ as more and more Canadians are unable to provide their families with healthy and affordable food. Cases of food-related illnesses, such as obesity and heart disease, have reached near pandemic levels, and are directly related to consumption patterns and the popularity of processed foods. Moreover, many Canadians are not equipped with the skills or the resources to cook healthy meals.

As we recognize the value of food within our own lives and our society, we also realize that we need to shift how we think about and manage our food.⁴ This change in mindset has seen one popular phenomenon result: local food movements are springing up across Canada and around the world, as communities are beginning to care more where their food is coming from and the social, economic, and environmental implications of what they eat. Stakeholders in the food system such as individuals, food producers, government policymakers, and public agencies, are bringing food issues to the forefront of public discourse to raise awareness about the importance of a local or regionally-based sustainable food system.

This Regional Food Assessment is an important contribution toward these current discussions. Bringing local, sustainable food into the major institutions in Stormont-Dundas-Glengarry Counties

and Cornwall is an opportunity to not only positively influence the health of our communities, but to also provide a major market for and source of income to our local producers, processors, and distributors. Moreover, it has incredible potential to decrease our communities' environmental footprint, create meaningful jobs, invigorate our local economy, and ensure the overall sustainability of our region.

About the Assessment

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The **first part of the assessment** involved evaluating the demand for local and sustainable food from major institutions in SD&G including high schools (cafeterias and Student Nutrition Programs), daycares, preschools and Early Years/Learning Centres, hospitals, and long-term care centres. At the same time, the capacity of local farmers to meet institutional demand was assessed. Surveys and interviews were the main tools used to gather this data. Existing linkages between supply and demand were then explored, such as infrastructure, distribution systems, and procurement policies. Finally, a critical analysis of the barriers, gaps, and opportunities in our region's food system was conducted. This data, as well as a series of recommendations for next steps toward building a stronger, more sustainable food system in SD&G, are included in this report.



*Participants at the Community Food Workshop in Cornwall.
(Stevens, 2012)*

In the **second part of the assessment**, a series of “Community Food Workshops” were held in each county in SD&G to learn more about each region's specific food system and gain a sense of each community's views on food. These two-hour workshops in Stormont, Dundas, Glengarry and Cornwall consisted of a series of three activities: asset-mapping, visioning, and a general discussion. A separate workshop with a similar format was also held with the All Things Food Network members, many of whom work on food security-related issues and projects within their agencies, organizations and businesses on a regular basis. The feedback from these workshops is included and commented on in this report.

Overall, through this Assessment process we hope to enable the development of a more sustainable and resilient local food system in Stormont, Dundas, Glengarry Counties and the City of Cornwall. We are blessed with a solid foundation for a strong local food system, including a vast amount of land, agricultural businesses, agricultural-related skills and resources, established relationships and networks, a rural culture, and caring, close-knit communities, and we must catalyze on these assets to enable its development and success. Food has incredible potential to bring “health, wealth, community, and connection⁵”, and we must harness its power to bring these benefits to SD&G.

Community Profile: Stormont-Dundas-Glengarry Counties and the City of Cornwall

Geography and Environment

Stormont, Dundas, Glengarry Counties and Cornwall are situated in Eastern Ontario, bordered by New York State and the Akwesasne Mohawk Reserve to the south, and the province of Quebec to the East. SD&G-Cornwall is approximately one hour from Ottawa and Montreal and two hours east of Kingston. Cornwall is the largest city within the region, and acts as the main economic and regional urban hub. The area's medium-sized towns include Winchester, Morrisburg, Alexandria, Iroquois, and Lancaster. Small semi-rural low-density communities dot the landscape and many residents choose to live rurally.

Cornwall is located along the Quebec City-Windsor mega-region, and is served by an excellent transportation network which includes Highways 401, 416, and 417, the CN mainline, and the St. Lawrence River. Cornwall also offers direct access to the United States via the Seaway International Bridge to New York State.⁶ The St. Lawrence River borders the southern part of the region, and offers transportation options through the St. Lawrence Seaway shipping route.



Stormont, Dundas, & Glengarry Census Map (StatsCan, 2011)

Eastern Ontario's humid continental climate makes the region's growing season ideal for agriculture. Winters are generally long and experience heavy snowfall, and summers are moderately hot.⁷ The landscape is flat, plain, with a significant concentration of fertile soils in Stormont and Dundas Counties.

History and Culture

SD&G and Cornwall is a region steeped in deep history and culture. First settled by the United Empire Loyalists after the American Revolution in the late 18th century, the area quickly became inhabited by English, Scottish, and Irish farmers. The city of Cornwall was founded in 1784 and promptly became the industrial, administrative, and economic centre of Eastern Ontario.⁸ The area's large French-Canadian community formed in the mid-19th century, during Cornwall's booming textile and paper industries. The 1950s welcomed the completion of the St. Lawrence Seaway.

A large number of families have called SD&G home for generations, and many can trace their lineage back to the first Loyalist settlers. Residents in the amalgamated municipalities still identify strongly with their historic rural villages rather than with their larger municipalities.⁹ Each year, county fall fairs and events such as the Glengarry Highland Games showcase community pride and history, and display the agricultural bounty and heritage of the area.



Farmland in North Dundas County (Stevens, 2012)

Demographics

The total regional population of Stormont-Dundas-Glengarry and Cornwall is approximately 111,164 persons (City of Cornwall: 46,340; Dundas County: 22,019; Glengarry County: 23,413; Stormont County: 19,392).¹⁰

In recent years, the region has increasingly become home to a diverse array of residents from across the globe. There are many Dutch and Swiss family-run farms, particularly in Stormont and Dundas Counties, and Cornwall is home to thriving and close-knit Indian, Pakistani, and Native communities

The average earnings for each region in SD&G are below the Ontario average, however the cost of living and land in the region are considerably less expensive than elsewhere in Ontario, making it a very affordable region to live in.¹¹

SD&G has been branded as an attractive region for retirement, with approximately 40% of residents over 50.¹² Location, a low cost of living, and community ties can be attributed to this trend.

Industry and Employment

Industry and agriculture have historically been the economic lifeblood of SD&G. Though the region experienced a decline in industry in the early 2000s, the industrial sector continues to play a significant role in the region's economy.

According to census data, manufacturing and construction industries, wholesale and retail sales, and health and education are currently the leading industries for employment in SD&G.¹³

Faces of SD&G's Food System

*Homestead Organics Ltd.,
Tom Manley*

The Manley family has a long history of farming in Stormont County. Located in Berwick, ON, the family now runs Homestead Organics Ltd., an organic farm supply and service business. It offers organic livestock feeds and supplements, seed for field and vegetable crops, organic soil amendments, and stores, cleans, and markets organic food grains and feed grains. A small organic foods shop on-site sells organic dry goods and some refrigerated foods.

Homestead's clientele is "local and afar." It is the largest buyer of organic grains in Eastern Ontario, and supplies dealers and farmers with feeds throughout Ontario and in Quebec, Nova Scotia, and New York State. Homestead has employed several strategies to actively increase organic supply and demand within SD&G, offering the services of agronomists and livestock nutritionists to local farmers and developing marketing materials.

*Tom and his son Yannick are currently working on "**Organic Central**," a food hub that would be "Canada's first organic food park." The goal of the hub is to "recreate the local food processing capacity, bridge the gap between field and fork, and bring more great organic food to [consumer's] plates." The project could bring significant benefits to SD&G's local food economy.*

(See Appendix B for Organic Central's brochure)

SD&G's agricultural sector employs nearly 6% of the region's labour force.

Approximately 15% of SD&G's workforce is employed in the food processing sector,¹⁴ the third largest manufacturing sector in Ontario and a significant industry in Eastern Ontario's overall economy.

SD&G is home to large-scale multinational food processing facilities, including Kraft Canada Inc., tied for second place as SD&G's largest private employer with 350 jobs and Parmalat, ranked 6th with 190 jobs.¹⁵ Prince Foods and Glengarry Fine Cheese are also notable food processing employers in SD&G. The United Counties report that over 85% of the products made at food processing facilities in SD&G are exported from the region.¹⁶



Derks Elevators near Chesterville, ON. (Stevens, 2012)



Glengarry Fine Cheese is just one example of the food processing facilities present in SD&G (Glengarry Fine Cheese, online)

Eastern Ontario, and particularly in SD&G, is noted to have **"perhaps the best opportunity to attract a large multinational food and processing investment than other food processing clusters in Ontario."**¹⁷

Eastern Ontario is an attractive region for food processing industries for several reasons. The area offers lower plant operating costs than other regions in Ontario and the US, wages for production workers are up to 20% lower, workers are generally productive and loyal (showing less turn over than in other food processing clusters), and its transportation routes and geographic location are excellent for "rapid and

economical distribution of materials and products to and from processing plants."¹⁸

According to the SD&G Community Futures Development Corporation, a multiplier effect has occurred in industries that support food processing. These "offshoot economic opportunities", including packaging, supply purchasing from producers, warehousing and distribution, biotechnical and agricultural research, and retailing and food services,¹⁹ provide significant economic advantages to the region. Regional off-shoot industries to the agricultural sector, such as bio-product companies, include Natunola Health Inc., Hendrick Seeds, and Tri-County Protein Collaboration.

Population Health & Food Insecurity

Residents of SD&G share similar health trends with the rest of Canada: inactive lifestyles and unhealthy eating patterns are both causing diet-related illnesses to increase in residents. Research has shown that even with sufficient incomes, many Canadians still do not eat a balanced diet.²⁰ According to the Eastern Ontario Health Unit's 2011 report "Lifestyle Behaviours and Health Status of Eastern Ontario"²¹:

- 60.5% of Eastern Ontario respondents reported being overweight or obese – significantly higher than the Ontario average of 52.6%;
- Dundas County holds the highest rate of overweight or obese adults and children, at an alarming rate of 74.5% of respondents (in comparison, Glengarry County was reported at 45.7%);
- 29% of adolescents in Eastern Ontario reported being overweight or obese – significantly higher than the Ontario average of 20.9%.

Furthermore, **food insecurity is on the rise in the region.** In 2011, SD&G food banks reported a rise in food bank use and need for assistance,²² which mirrors the growing number of Canadians who require emergency food assistance. In 2012, Food Banks Canada estimated that 882,000 Canadians were provided with assistance by food banks during a one-month period; this figure represents a 30.6% total increase in emergency food assistance in just four years (2008-2012).²³



Students from École Ste. Lucie near Cornwall, ON learn gardening skills. (Kittle, 2011)

Food insecurity has many negative effects on a persons' wellbeing. Persons who are food insecure consume significantly fewer nutrients than those who are food secure and are more prone to obesity and other food-related illnesses than the general population.²⁴ In school-aged children especially, food insecurity has been linked to behavioural problems, delayed development, frequent sickness, and educational underperformance.

Food Purchasing Trends

Although no regional data exists on the amount of money Stormont-Dundas-Glengarry residents spend on food purchases, Statistics Canada 2010 data for Ontario households shows that **on average, Ontarians spend \$140.58 per week buying food in stores and/or restaurants.**²⁵ When this figure is multiplied by SD&G's estimated population of 111,164 persons, the resulting figure - **over \$1.5 million dollars** - is a significant amount of money which could be spent within our local food economy.

The chart below, displays a breakdown of Ontarian’s food spending, between food purchased in stores and restaurants, and the different types of foods that Ontarians are buying.

Average Household Food Expenditure in Ontario (2010)

Total Food Expenditures	\$7,310
Food Sources	
- Food purchased from stores	\$5,223
- Food purchased from restaurants	\$2,087
A Breakdown of Food Purchasing Trends	
- Non-alcoholic beverages and other food products	\$1,175
- Dairy products and eggs	\$800
- Fruit, fruit preparations and nuts	\$692
- Meat	\$597
- Vegetables and vegetable preparations	\$546
- Bakery products	\$545
- Cereal grains and cereal products	\$328
- Processed meat	\$349
- Fish and seafood	\$192

Source: StatsCan

Of all household food expenditures, **food is ranked as the fourth most important household expense²⁶** for Ontarians after shelter, accommodation, and transportation. To our knowledge, no data has been compiled on the percentage of these food dollars which go towards food grown or processed in Ontario.

Top 10 Household Expenditures in Ontario (2010)

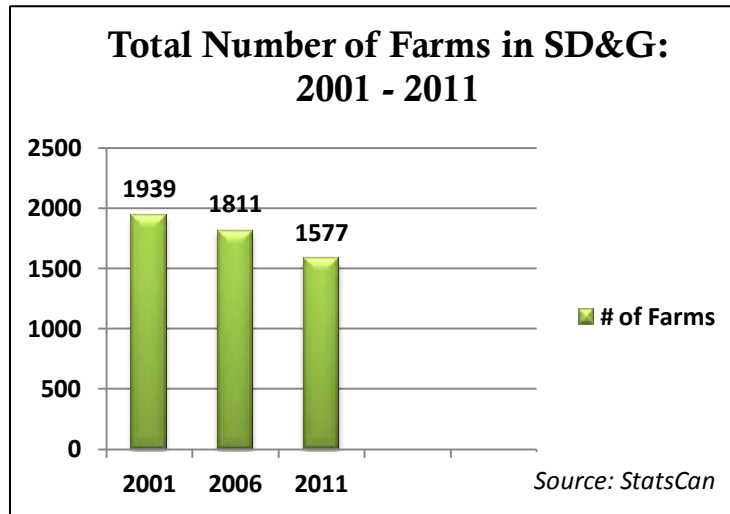
Total average expenditures	\$70,574
1. Shelter	\$14,997
2. Principal accommodation	\$13,598
3. Transportation	\$10,999
4. Food expenditures	\$7,443
5. Household operation	\$3,773
6. Recreation	\$3,539
7. Clothing and accessories	\$3,452
8. Health care	\$2,194
9. Household furnishings and equipment	\$1,923
10. Gifts of money, alimony, and charitable contributions	\$1,609

Source: StatsCan

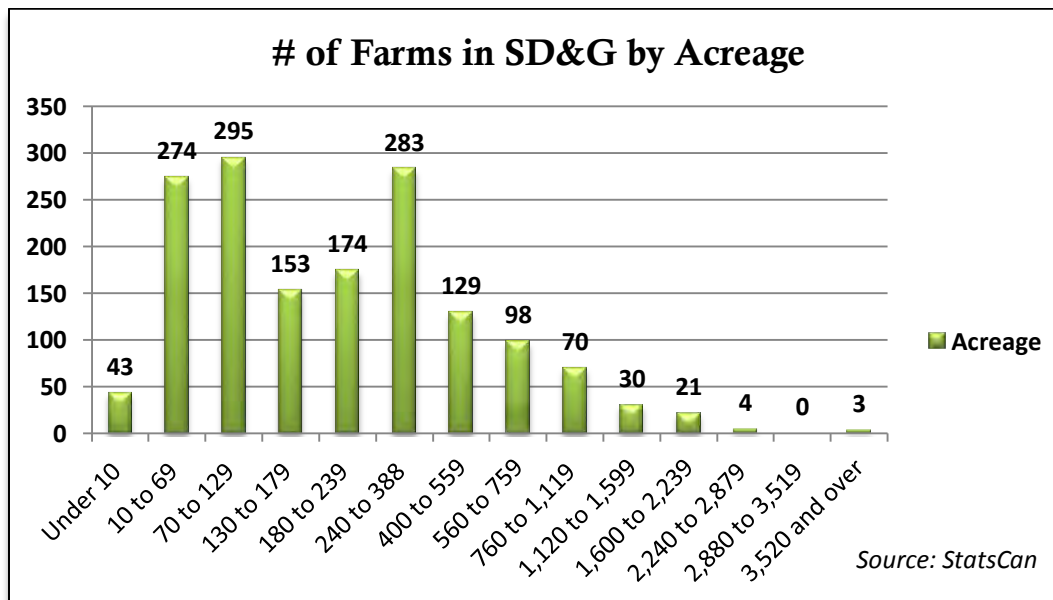
Agriculture

Number of Farms and Farm Sizes

SD&G, known for being an agricultural region, boasts a large number of farms – estimated at 1,577 in the 2011 census.²⁷ This figure decreased a significant amount from the last census, by a total of 234 farms (1811 farms were reported in 2006). **Of all Eastern Ontario regions, SD&G has the highest total number of farms per region.**



Farm sizes in SD&G mirror Eastern Ontario and Ontario farm sizes closely, with all regions showing a trend toward larger farm sizes. **The greatest number of farms in SD&G range between 70 to 129 acres (295 total farms).** Farms ranging between 240 to 399 acres come in at a close second (283 farms). There are also a significant number of farms classified between 10 to 69 acres (274 farms). The chart below portrays the number of farms appropriated to each acreage category.

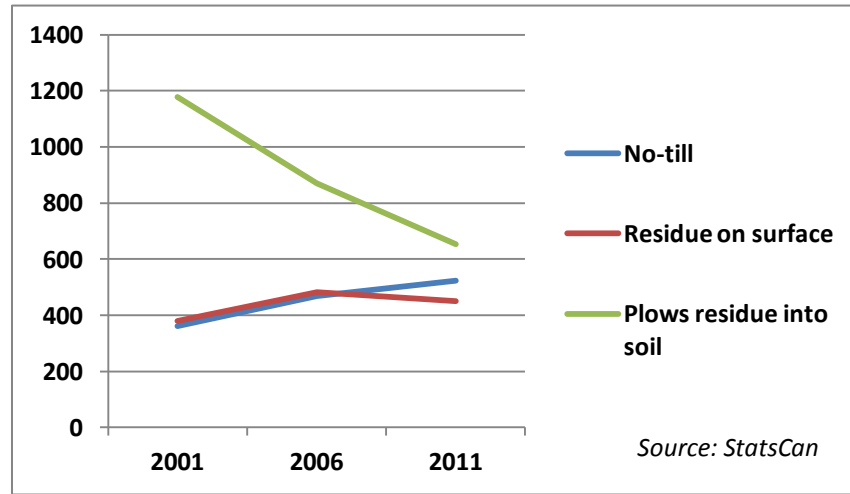


Land Inputs

Of the total number of farms in SD&G, a total of 144,780 hectares of land is planted in crops.²⁸ **The usage of land inputs on SD&G farms increased from 2006 to 2011 in terms of overall acreage, despite a declining number of overall farms.** These inputs include the use of pesticides such as herbicides and fungicides, commercial fertilizer, and lime. The only decrease in land inputs that was seen was in the use of insecticides.

Conservation Practices

SD&G farmers generally are adopting conservation practices, such as minimum tillage methods, as shown in the chart below:



SD&G Farm Tillage Trends (2001-2011)

In addition, many farms are practicing crop rotation (1,074 farms); have windbreaks or shelterbelts (417 farms); and have buffer zones around water bodies (338 farms). A small number of farms (87) utilize winter cover crops.

Types of Farms

According to the 2011 census, **oilseed and grain production and cattle ranching and farming are the leading agricultural industries in SD&G.** The high number of farms associated with these industries – 527 farms and 518 farms respectively – are more than double the number of farms in the next leading agricultural industries.

Also noteworthy from the census data on agricultural industries in SD&G is the low number of fruit, tree nut, vegetable, and hog and pig farms within the region. This observation was also seen in Statistics Canada data for all other areas of Eastern Ontario.



Organic blueberry bushes at Rubicon Farms, Avonmore ON (Kittle, 2012)

A listing of SD&G farms by industry group is included on the next page.

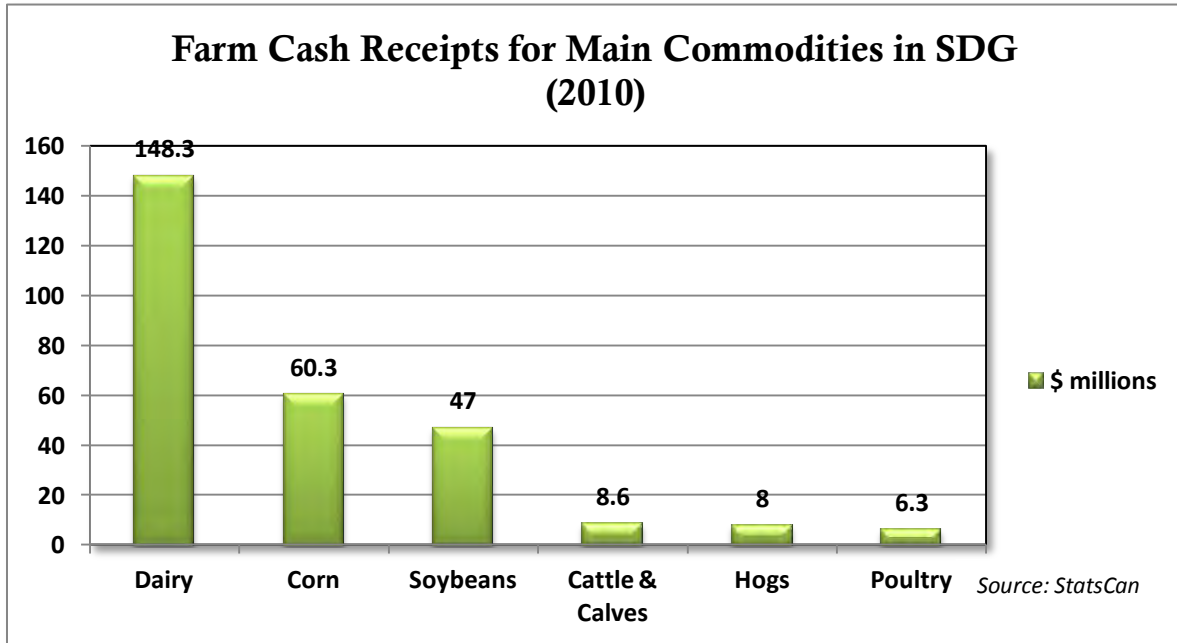
SD&G Farms by Industry Group (2011)

	# of Farms
1. Oilseed and Grain Farming	527 farms
<ul style="list-style-type: none"> • Soybean farming (148) • Dry pea and bean farming (4) • Wheat farming (7) • Corn farming (265) • Other grain farming (103) 	
2. Cattle Ranching and Farming	518 farms
<ul style="list-style-type: none"> • Dairy cattle and milk production (352) • Beef cattle ranching and farming, including feedlots (166) 	
3. Other Crop Farming	248 farms
<ul style="list-style-type: none"> • Hay farming (198) • Fruit and vegetable combination farming (2) • Maple syrup and products production (14) • All other miscellaneous crop farming (34) 	
4. Other Animal Production	141 farms
<ul style="list-style-type: none"> • Horse and other equine production (72) • Animal combination farming (46) • All other miscellaneous animal production (9) • Apiculture (14) 	
5. Sheep and Goat Farming	41 farms
<ul style="list-style-type: none"> • Sheep farming (32) • Goat farming (9) 	
6. Greenhouse, Nursery, and Floriculture Production	29 farms
<ul style="list-style-type: none"> • Nursery and tree production (18) • Floriculture production (6) • Other food crops grown under cover (2) • Mushroom production (3) 	
7. Poultry and Egg Production	22 farms
<ul style="list-style-type: none"> • Chicken egg production (10) • Broiler and other meat-type chicken production (9) • Turkey production (1) • All other poultry production (2) 	
8. Fruit and Tree Nut Farming	21 farms
9. Vegetable and Melon farming	20 farms
10. Hog and Pig Farming	10 farms
Total number of farms =	<u>1577 farms</u>



Main Agricultural Commodities

Dairy production is the main agricultural commodity in SD&G, producing \$148.3 million dollars in cash receipts in 2010. Corn and soybeans are ranked second and third respectively, at \$60.3 million and \$47 million. The next top commodities - cattle and calves, hogs, and poultry – produce significantly less in profits than the first three, with combined profits of \$22.9 million.



Organic Agriculture

In SD&G, organic agriculture is a small percentage of the overall agricultural industry. In 2011, there were 28 farms offering organic products for sale; 25 farms offering certified organic products for sale; and 4 farms in-transition to organic practices. While there is no data from the 2006 census to show whether or not the number of farms classified as organic has increased, a comparison between 2006 and 2011 data on certified organic and in-transition to organic operations shows that these types of operations have increased by 24% and 20% respectively. This trend mirrors organic trends in both the Eastern Ontario region and for the province of Ontario. Of the organic farms in SD&G, the leading industries are organic and certified organic hay or field crops, and organic and certified organic animals or animal products for sale.



A local garlic grower volunteers his time and garlic-planting expertise at All Things Food's organic garlic plot in Chesterville, ON. (Kittle, 2012)



*Harvesting garlic at All Things Food's garlic plot in Chesterville, ON.
(Kittle, 2012)*

Average Age of Farm Operators

As of 2011, the average age of farm operators in SD&G was 54.1 years of age, a small increase from 2006 (51.5). This figure is slightly less than the average for Eastern Ontario (55 years) and Ontario (54.5 years), but almost on par with the Canadian average of 54 years of age. This trend across the nation is telling, showing that young persons are not getting involved in agriculture as they once were.

Hired Farm Labour

In 2011, 586 farms in SD&G reported hiring a total of 1,855 workers. 927 of these labourers worked year-round (on a full-time or part-time basis), while 928 labourers worked on a seasonal basis. Farms in SD&G hire the most workers of all regions in Eastern Ontario, followed by Ottawa (1,787) and Prescott-Russell Counties (1,217).

Faces of SD&G's Food System

*Derks Farms and Elevators,
Gary & Marty Derks*

Located southeast of Chesterville, ON, Gary and his son Marty cultivate over 2,014 acres and manage an elevator and processing operation of 10,000 tonnes. They are currently producing 180 bushels of corn, and 49 bushels of beans per acre, however their goal is to increase yield and density to 200 bushels of corn per acre by 2013. Additionally, they process organic and non-organic feed for livestock and grains and beans for human consumption. Their products are sold through direct purchasing and shipped locally, regionally, and to national markets.

Derks spoke of the challenges of farming today: high costs of machinery, the difficulty of finding reliable labour, and the need to constantly modernize. Canadian farmers compete with cheap produce from the USA, South America, and China, flooding Canadian markets, and the demand for cheap food by consumers. Converting farming practices to become Certified Organic or selling solely to a local market, means high economic risks for many large-scale farms, and with no government incentives to do so.

Shifting Attitudes toward Food

“Few other systems touch peoples’ daily lives in such an intimate way and thereby provide such a strong motivation and opportunity for citizenship...Food, like no other commodity, allows for political awakening...draws on and helps nurture authentic relationships... has the potential to generate active citizenship... [and] suggests both belonging and participating, at all levels of relationships.”

(Welsh and MacRae, 1998)²⁹

A Global Food System

Our food system in Canada is tied to the large-scale global market, now more than ever before. Large corporations, government policies, and the economic market have a significant influence on the agricultural industry and consumers’ food options. Less than fifty years ago, the Canadian diet was largely shaped by seasonal availability of products and limitations on transport. The 21st century consumer has come to expect a large number of food products, and fresh, even exotic, produce cheaply, in large quantities, on demand, and year-round.

A considerable amount of food sold in Canada is imported from the United States and elsewhere, despite the fact that many products can be readily grown in Canada. For every two dollars of food products Ontario exports, it imports three dollars.³⁰

Canadian Agriculture

Canadian agriculture has evolved to compete in the global market. By industrializing, increasing farm sizes, intensifying production and output, and selling to large foreign markets, Canadian producers and processors have become some of the largest and most productive operations in the world.³¹ But despite these successes, farmers are very much at the mercy of the complex food system. Most of the profits of the food chain go directly to food-processing companies and supermarket chains.³² The more complex the food chain becomes, the less profits a farmer sees.

While the prices Canadian consumers pay for food continue to increase, the price farmers receive increases little.³³ Canadian farm incomes continue to fall. Producers are selling mainly to large food processing

Faces of SD&G's Food System

*Farm Boy Grocery Stores,
Marc Renaud (Cornwall Store Manager)*

With thirteen locations now in Eastern Ontario, the Farm Boy grocery chain has been selling fresh produce and goods since the opening of its first store in Cornwall in 1981. Smaller than larger, more corporate grocery chains, Farm Boy caters to a health-conscious customer base, and sells primarily fresh produce, meats, breads, dairy, and to a lesser degree, frozen and processed items.

Freshness, quality, consistency, and reliability are key demands from clients. Products are shipped by truck daily from Farm Boy's main distribution centre in Ottawa, ON, where goods are bought from the larger markets in Montreal and Toronto.

Product sources vary by season, and whenever possible, produce is sourced regionally from Eastern Ontario and Quebec, followed by the United States, and beyond. Farm Boy's processed foods are generally from Eastern Ontario and Canada.

In recent years, Cornwall's Farm Boy has bought produce from local farms to support and encourage the local food system and to meet the growing demand for local products. In the summer of 2012 for example, Farm Boy partnered with a Glengarry farmer to supply and sell corn on the cob for the season.

companies, due to a system that demands industrial mass production of cheap food.

Toward a Sustainable and Just Food System

A Growing Awareness

Since the mid-1990's, awareness among Canadians of the importance of community food security has grown.³⁴ With the rising cost of oil and gas, increasing food prices, and a strong Canadian dollar, the need to strengthen the capacity of Ontario's farmers to grow more of the foods we eat here in Ontario and empower individuals and families to grow their own foods is being realized.

The Benefits

Alternatives to the conventional global food market offer great economic, environmental, and social benefits to communities. The benefits of developed local food systems can include local economic growth, a strengthening of community identity and pride, a reawakening of healthy food culture, sustainable community projects, and more. And the fruits of local food systems are in demand - **consumer demand for local foods continues to grow by 7 to 8% per year.**³⁵ Studies show that consumer appeal for local produce is based on its many values, including qualities of freshness, taste, less packaging, a lighter environmental impact, a sense that it is healthier to eat locally, a desire to reconnect with farmers, to strengthen the community's self-reliance, and to keep earnings circulating in the local economy.³⁶

Ontario: A Prime Foundation for Food and Farming

A report written by the Toronto Food Policy Council, "A Home-grown Strategy for Ontario Agriculture", reveals that **Ontario has 52% of the best farmland in Canada**; the province contains all of Canada's Class 'A' Climatic Potential farmland, and most of its Class 'B' land.³⁷

Author Wally Secombe argues that every crop that can be readily grown in Ontario "should be grown here in quantities sufficient to meet local demand."³⁸ In Stormont-Dundas-Glengarry, we're perhaps even more advantageously situated than many regions in Ontario to grow more of our food closer to home, due to the characteristics of our region's geography, culture and resources.

Did you know?

A head of lettuce grown in the California Salinas Valley and shipped to Toronto requires about 35 times as much fossil fuel energy in transport as it provides in food energy when it arrives.

The 2013 Food Price Index

Report published by researchers at the **University of Guelph** predicts Canadian retail food expenditures to increase between **1.5% and 3.5%** in 2013. Reasons for predicted price increases include: climate, geopolitical and economic risks, energy costs, currencies and trade, and Canada's food distribution and retail landscape.

Some predicted **price increases**:

- **Beef and pork:** 6-10%
- **Eggs:** 3.5 to 5%
- **Grain:** 1.4 to 2.7%
- **Fresh vegetables, fruit and nuts, fish and seafood, and vegetables:** 1-3%
- **Restaurant prices:** 3%
- **Snack and beverage prices:** 4%



*Cider being pressed at a fall harvest 'workbee' in Stormont County.
(Carriere, 2012)*

Faces of SD&G's Food System

Marlins Orchards and Garden Centre, Diane Lunan

Located on Highway 2, along the banks of the St. Lawrence River just west of Cornwall, George and Diane Lunan have operated a pick-your-own orchard, retail store, and garden centre since 1989.

As owner Diane pointed out, anyone can grow produce, but product consistency and strong distribution networks are needed to compete with large farms and stores. Consumers want consistency, aesthetically pleasing food, and affordable pricing - standards that are not always possible if food is grown locally or organically. The Lunans are continually expanding their orchards and diversifying their products and production methods in order to be competitive.

Marlin's has an established name and customer network in the region and the orchard has become a 'destination spot' for many. Though they sell to a mainly retail clientele, they have recently begun to supply 'school-grade' apples to local snack programs in nearby schools, and fruit and pumpkins to the Cornwall Green Food Box program.

Toward A Sustainable Food System in SD&G

We can work towards our collective food security in SD&G by building a sustainable and just food system together in our region.

A **sustainable food system** is one in which food is “produced, harvested, processed, distributed and consumed in a manner which maintains and enhances the quality of land, air and water for future generations, and in which people are able to earn a living wage in a safe and healthy working environment by harvesting, growing, producing, processing, handling, retailing and serving food.”³⁹ Each member of the community is actively engaged in building the food system into one that reflects these values – from making conscious buying decisions, to engaging households and institutions in composting food waste, to growing one’s own food and/or buying foods locally, to encouraging the adoption of policies by businesses and organizations which prioritize the health of the community and the environment.

A National Movement

The shift towards developing local and sustainable food systems is growing stronger. Local food movements are now a transnational phenomenon,⁴⁰ and various groups including government, community organizations, policy groups, private foundations, farming associations and environmental groups are actively engaged in promoting sustainable agriculture across Canada. The Government of Ontario recently passed Bill 130, *The Local Food Act*, in 2012, designed to promote and strengthen local agriculture throughout the province. Municipal planners are adopting a

sustainable food focus when zoning or drawing up Official Plans for municipalities. Municipalities are expanding farmer's markets, providing public space and infrastructure for urban agriculture, and including local food initiatives in policy⁴¹. Locally grounded alternatives and initiatives are thriving in many communities, and include farmers' markets, community and school gardens, community kitchens, Community Supported Agriculture (CSA), fair trade and local food options at restaurants, food co-operatives, gleaning activities, and school-based nutrition programs.

The time is ripe – let's manifest a good food revolution together in SD&G!



A sharing of the harvest: Red okra grown by a community member that was shared with the House of Lazarus Food Bank (Kittle, 2011)

Community Perspectives on Our Food System

From September through November 2012, a series of “Community Food Workshops” were held throughout SD&G to learn more about community members’ perspectives on their local food system. The workshops were attended by a diverse group of participants, including interested citizens, teachers, local growers, organizers of food-related programs, such as Community Supported Agriculture and the Green Food Box, and All Things Food network members.

The workshops included a general discussion on the local food system, a food asset exercise and a visioning activity. Though attendance was low at some workshops, the discussions were lively and informative, and participants had much to say about “all things food”. An online survey was also widely disseminated with the same activities for those were unable to attend the workshops. Below is a summary of what we heard, understood and read from these engagement exercises.

Food Assets in SD&G

Participants were firstly asked to identify items that they felt counted as “assets” in their local food system. **Food assets** generally include items such as "land, existing land uses, infrastructure that could be programmed for community food purposes; organizations working on issues connected to food and related community systems; organizational capacity; policy frameworks and plans; and existing programs and institutions that could be enlisted in efforts to foster community food security programs..."⁴² Below and on the next page is a listing of food assets in SD&G that participants came up with, grouped in eight broad categories:

“A sustainable food system is one in which...”

...is beneficial to both buyer and seller...

...caters to all income levels...

...consumers understand the security and value of growing their own food...

...urban and rural communities have strong relationships...

...local food options are available and in demand year-round...

...public and private institutions serve food from local producers...

...the general public and governments support local food-related policies...

...a healthy eating culture is cultivated in the community...

(Participant discussions, Community Food Workshops)

Responses to – What Food Assets exist in SD&G? Results from Community Food Workshops and Online Survey (2012)	
Community Infrastructure and Resources	• Community, church, or school kitchens available in every community to be used for workshops, canning sessions, or work spaces for local processors (for example, six community kitchens in North Stormont for potential use)
Community & Culture	• Small, tight-knit rural communities with strong agricultural traditions • Annual Agricultural Fall Fairs to promote local food in SD&G
Environment	• Favourable growing climate, growing season, fertile land
Food Programs	• Numerous local food programs in existence, like the Green Food Box, and two community gardens which have been very successful over the years • Small but thriving farmers markets and farm stand operations in the region (7-8 established farmers markets) • Health, hospitality, and other education programs, adopting a 'local food' focus
Geography	• Proximity to major transportation routes (HWY 401, Windsor-Quebec City Corridor) and large urban centres (Ottawa and Montreal)

Industry	<ul style="list-style-type: none"> • Strong agricultural sector in region; many diverse sectors (meat, dairy, apiaries, berry farms, CSAs, market gardens, maple sugar operations, etc.)
Skilled Community Members and Volunteer Base	<ul style="list-style-type: none"> • Skilled and willing individuals to teach food workshops, gardening techniques • Available volunteer pool: high school co-op and community hour volunteers available (14-18 year old), retirees, etc.
Space and Land	<ul style="list-style-type: none"> • Ample unused green space, community land, or school yards to be used for community gardens (e.g. underutilized farmland, Seaway and OPG lands, Cornwall waterfront).

Recommendations to Building a Stronger Local Food System in SD&G

Participants were asked to provide their recommendations to developing a stronger local food system in SD&G. The responses are grouped in six broad categories.

Responses to – “What is needed to build a stronger local food system in SD&G? Results from Community Food Workshops and Online Survey (2012)	
Advocacy	<ul style="list-style-type: none"> • Lobby municipal, provincial, and federal governments to develop stronger local food focus and provide incentives for growers, businesses, and consumers to buy and sell local. • Lobby local municipal governments and planning departments to adopt bylaws to make urban agriculture and farming feasible within city limits; allow city property to be developed into community gardens. • Voice our desires for local food to be used, served, and sold by local restaurants, caterers, cafeterias, and grocery stores. • Put local food issues at the forefront of community discussions!
Communications & Promotion	<ul style="list-style-type: none"> • Use social media (e.g. Facebook, Twitter, and the Internet) to strengthen awareness of food networks. • Further develop the All Things Food information hub to create a strong information hub/network to share food-related resources, events, and volunteers. • Develop a way to identify local food options and advertise them in SD&G, to inform and connect consumers (such as an SD&G local food map or food almanac).
Education	<ul style="list-style-type: none"> • Encourage school boards to create a food-focused curriculum to teach school-aged children/teenagers key food skills (growing, cooking, preparing, healthy eating habits) which will in turn benefit family and community health.
Infrastructure	<ul style="list-style-type: none"> • Develop a ‘local food hub’ or central marketplace to improve consumer accessibility to and awareness of local foods in SD&G.
Relationships and Networks	<ul style="list-style-type: none"> • Create stronger networks between growers, organizations, and consumers to develop a widespread supply and demand for local food to be used, served, and sold by local restaurants, grocery stores, and institutions like hospitals and schools. • Develop stronger volunteering networks for food programs; seek assistance from high school co-op students, high school 40-hour community service volunteers, and retirees.
Research	<ul style="list-style-type: none"> • Identify and organize unused land and available community space in SD&G to develop comprehensive community garden networks to help people grow and process their own produce.

During the survey process, we also asked institutions, producers, and processors for their ideas on how we can strengthen our local food system. Their responses are broadly grouped into six general categories. Many of the same points were raised by these groups that were raised in the community engagement workshops.

Responses to – “What is needed to build a stronger local food system in SD&G? Results from Institutional and Producer/Processor Surveys (2012)	
Accessibility	<ul style="list-style-type: none"> • Enabling (producers and processors) access to chain stores • For grocery stores to be more willing to sell local products, especially the big chains, and clearly identifying these products as local
Changes in Regulations and Policy	<ul style="list-style-type: none"> • Lobbying the government to open up regulations for the local production of direct-marketed eggs, meat, poultry and dairy • A reduction in laws/regulations • The ability to get past restrictions • Policy change... increased budgets for healthy food, education, and ease of access
Communications & Promotion	<ul style="list-style-type: none"> • Continuing our “Buy Local” program • To keep promoting our local products • The development of an SD&G Local Food Map
Education & Awareness	<ul style="list-style-type: none"> • Consumer education about real food / a greater awareness and value of real food • Awareness and access for both the consumer and farmer • Consumer education and awareness • Education - One of the hurdles I find that hinders growth is the lack of understanding on the costs involved in raising local products...most consumers these days do not understand the true cost of production and simply want a cheap but better quality product. Unfortunately they are disappointed and our local products cannot be offered in this area successfully.
Funding & Programs	<ul style="list-style-type: none"> • The creation of a small farm-employee cost-share program for SDG • Government support of artisanal food businesses • Funding for promotion and advertising for local producers • Increased budgets for healthy food, education
Relationships & Networks	<ul style="list-style-type: none"> • (That) everyone works together • Networks and charities unite to work towards common goals

All groups agreed on the strong need for local foods promotion and ‘real foods’ education; the development of a stronger local food network; and funding support for local food businesses and local food/healthy food programs to develop a stronger local food system in SD&G. We included many of these common suggestions in the strategies that we developed at the end of this report.

Regional Demand for and Supply of Local and Sustainable Food

From October through December 2012, we engaged major community institutions throughout SD&G in interviews and mail and web-based surveys to assess the demand for local and sustainable food from institutional markets. At the same time, we surveyed and interviewed local food producers and processors to evaluate the supply of local and sustainable food in SD&G that could match institutional demand. Approximately one hundred and thirty surveys were disseminated between both groups, and twelve interviews were conducted with key informants.

The findings from this research are documented below in two separate sections: institutional, and producer and processor survey & interview results.

I. Institutional Survey & Interview Results

A range of community institutions were surveyed and interviewed for the Regional Assessment including: daycares, preschools, Early Years and Learning Centres, schools, colleges, hospitals, and long-term care centres. A small sampling of restaurants and catering businesses were also surveyed which used local food to some extent in their menus, to create for a stronger overall study.

Response rates from some institutions were better than others. The strongest participation rate was seen in hospital or long-term care institutions, followed by high school hospitality/food programs, and daycares, preschools, Early Years and Learning Centres. A listing of each of the group's response rates is included below.

Survey Response Rates

- **SD&G Hospitals and Long-Term Care Centres:** 9/12 or 75%
- **High Schools and College Cafeteria Providers:** 3/12 or 25%
- **High School Hospitality/Food Programs:** 5/9 or 56%
- **Daycares, Preschools, Early Years and Learning Centres:** 7/19 or 37% (Note: 1 survey was provided to centres with more than 1 satellite site)
- **Student Nutrition Program Providers (Focus group):** 1/1 or 100%
- **Restaurants:** 4/14 or 29%

Faces of SD&G's Food System

Glen Stor Dun Lodge

Stephanie Hill-Nichols, Nutritional Services Coordinator

Glen Stor Dun Lodge is a long-term care facility in Cornwall, ON in operation since 1912. Currently, 132 residents call the Lodge home. The Lodge serves an average of 550-600 meals per week to its residents, Meals-on-Wheels recipients, staff, and visitors. Its residents are actively involved in making decisions about the food served, with monthly discussions held about the Lodge's menus and an in-house Food and Nutrition Committee.

The Lodge relies on several food distributors to purchase the foods they serve, and through these distributors, they are able to source some regional/Ontario local foods, such as strawberries and corn on the cob. Residents also garden on-site during the growing season.

Though they would be interested in serving more local foods and local food products, pricing, consistency of food quality, availability, and delivery are significant challenges.

Surveys were filled out by Nutrition, Dietary, and Food Service Managers and Directors; Owners, General Managers and Executive Directors of Institutions and Businesses; Daycare Program Coordinators; and High School Hospitality Teachers.

a. Regional Distribution of Survey Participants

Survey participants were located throughout the United Counties, with the majority of participants from Cornwall. Below is a breakdown of the regional distribution of the survey participants:

- Cornwall Institutions/Restaurants: 10/29 or 34%
- Glengarry Institutions/Restaurants: 6/29 or 21%
- Dundas Institutions/Restaurants: 7/29 or 24%
- Stormont Institutions/Restaurants: 4/29 or 14%
- Cornwall & SDG Institutions/Restaurants: 2/29 or 7%

b. Kitchen Infrastructure

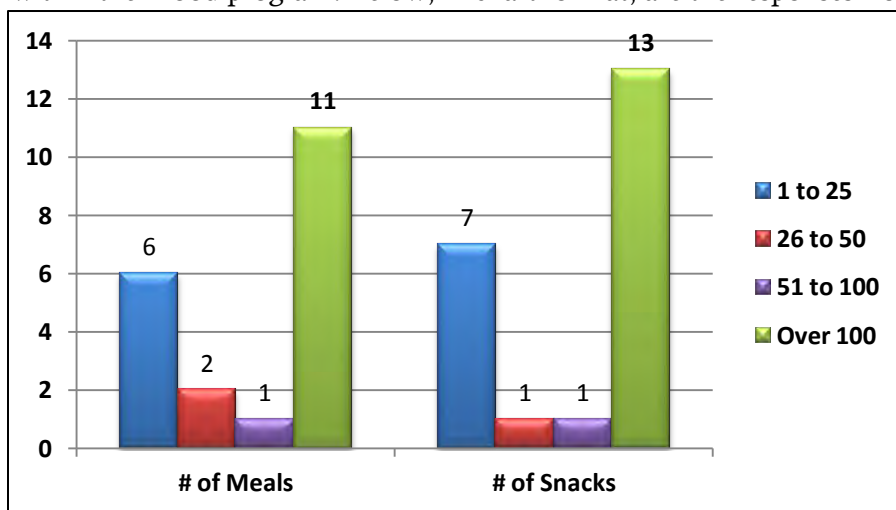
Of the 29 survey participants, 22 responded that they operated “full-service kitchens”, where food is prepared and served on-site. One institution operated a mixed kitchen – including both full-service preparation and a “finishing and re-thermalizing station,” where food is prepared elsewhere, finished, and served on-site. One institution operated strictly a finishing and re-thermalizing station, and one institution also operated a production kitchen, where food is prepared and shipped to external sites.

- Full-Service Kitchens: 22 survey participants
- Finishing and Re-thermalizing Station: 1 participant
- Full-Service & Finishing/Re-Thermalizing: 1 survey participant
- Production Kitchen: 1 participant
- Other/Did not respond: 5 participants

Many of the daycare providers commented that they don’t do much in the way of meal preparation – often only on occasion. However, most daycares indicated that they prepare snacks, or that program participants bring their own snacks from home.

c. Number of Meals & Snacks Served on a Weekly Basis

All survey participants were asked to indicate the number of meals and snacks that they serve on a weekly basis within their food program. Below, in chart format, are the responses from participants:

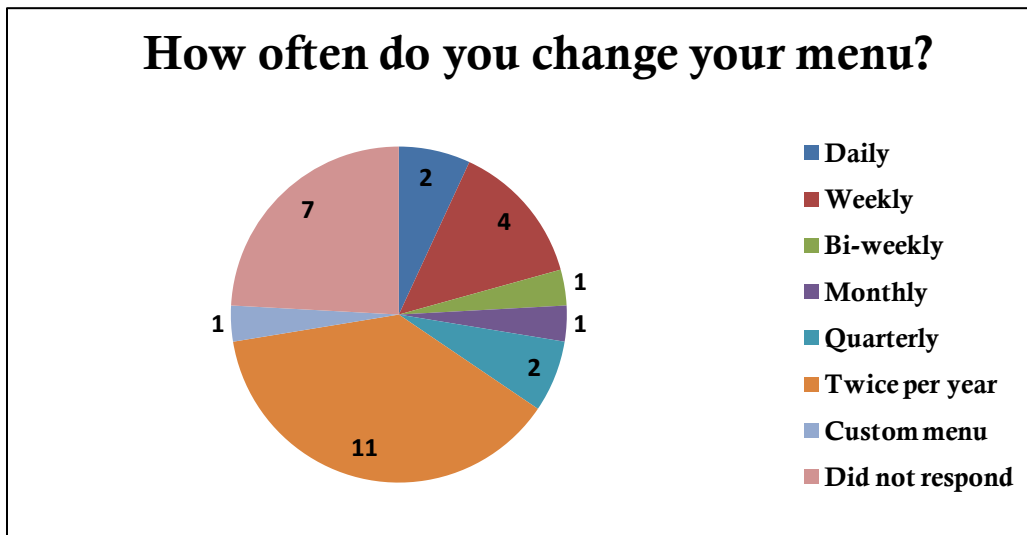


The majority of survey participants serve more than 100 meals and snacks on a weekly basis. Included in the 100+ category were hospitals, daycare providers, restaurants, and high school hospitality/food programs.

d. Food Menus

Menu Changes

Institutions and restaurants were asked to comment on the frequency that they change their menus, and whether or not they use a cycle menu. The majority of institutions which provided feedback on this question changed their menus twice per year.



Cycle Menus

Thirteen institutions and restaurants indicated that they used a cycle menu, with most respondents (62%) using a 4-week menu cycle.

e. Food Suppliers, Contracts and Buying Clubs

Food Suppliers

Institutions and restaurants were asked to check off the different food suppliers that they used, and indicate if they were part of a Buying Club. The chart below reveals the large number of different food suppliers being used by SD&G institutions, as well as the most popular food suppliers.

Food Supplier	# of Survey Participants that Buy from	% Food Budget Allocated to this Supplier (Range)	Popular Examples (if applicable)
1. Agro Pur	3	1% - 6%	N/A
2. Betty Bread	1	-	N/A
3. Brown's Fine Foods	1	-	N/A
4. Canada Bread Co.	5	1% - 5%	N/A
5. Cardinal Meats	5	5% -20%	N/A
6. Caterer	1	-	Catering 2 Kidz
7. Compass Group	1	-	N/A

8. Desautels Meat	1	-	N/A
9. Gordon Food Services	3	0 - 31%	
10. Greg's Meats	1	-	N/A
11. Grocery Store	18	1% - 100%	Farm Boy, Baxtrom's, Andy's Foodland, Mike Dean's, Giant Tiger
12. Hospital Food Services	1	-	N/A
13. Kitchen garden	1	5%	
14. Local farms/farmer's market	8	1 -15%	J&L Produce, Connaught Acres, Peasant's Craft, Langview Farms, Barkley's Orchard, Beautyrock Plantation, Smyth's Orchard, Marlin's Orchard, Metcalfe Farmer's Market
15. Local butcher	1	25%	N/A
16. Macartney Fruits & Vegetables	2	0 – 10%	N/A
17. Natrel/Sealtest	3	0 - 5%	N/A
18. NFRS Fruits and Vegetables Wholesaler	1	-	N/A
19. Quattrochi	3	0 – 20%	N/A
20. Sysco Food Services	12	40 – 100%	N/A
21. Viandes Larocques Meats	1	-	N/A
22. Weston Bread	2	0 – 5%	N/A
23. Other suppliers (unspecified)	2	-	N/A

As the chart reveals, the most popular institutional and restaurant food suppliers include grocery stores (various), Sysco Food Services, local farms, Cardinal Meats, and the Canada Bread Company.

Contracts

Six institutions – all of which were hospitals or long-term care centres - indicated that they were under contract with a food supplier. Of these six, four stated that this limited their ability to purchase foods from other suppliers.

When asked if the institution would be interested in working with their contact food service operator to increase the amount of local food purchasing options, many of those who did not indicate that they were part of a contract stated yes (a total of 7, mixed institutions). It's presumed that the text in this question was misunderstood, and there was a generalization of the term 'contract service operator', or that many institutions neglected to fill in the answer to the first question.

Buying Clubs

Eleven survey participants (38%) indicated that they were part of a food buying club. These buying clubs include (in order of most mentioned to least mentioned): Complete Purchasing Services;

Health Pro Canada; On Track; National Grocer's; and Costco. When asked if these institutions were able to buy outside of the Buying Club's approved supplier groups, only one institution stated that they would not be able to.

During an interview with one of the survey participants, the participant explained that their institution belonged to the Buying Club because it could never get the same (low) prices elsewhere; the buying power between 25+ institutions is one of the main factors which enables them to stay within their total daily resident food budget allowance of less than \$7 per day.

f. Food Expenditures

Gross Annual Food Expenditures

Gross annual food expenditures between participants largely varied; the majority of institutions in the under \$50,000 bracket included daycares, high school cafeterias, and high school hospitality programs, whereas most of the institutions over \$50,000 consisted of hospitals and long-term care centres, some restaurants, and Student Nutrition Programming (total budget).

Survey Respondents - Gross Annual Food Expenditures

• Under \$10,000:	6 participants
• \$10,001 - \$50,000:	5 participants
• \$50,001 – 100,000:	1 participants
• \$100,001-\$500,000:	7 participants
• \$500,001-\$750,000:	1 participants
• \$750,001 – 1,000,000:	2 participants
• Did not respond:	7 participants

Maximum Daily Allowance

Ten institutions or 34% of respondents indicated that they had a maximum food allowance per person per day that they could spend. This figure ranged between \$6.34 per day to \$7.68 per day.

g. Awareness of Food Origin

Survey participants were asked whether or not they were knowledgeable about the origin of the food that they purchase. The results were almost 50-50; eleven institutions said “yes”, they knew in general the original of the food that they purchased, while twelve institutions stated no, and six did not respond. While there was a true mix of institutions in both categories, all four restaurants were aware of the origins of the food they were buying. Below are two comments from survey respondents on this question:

- *Yes and no. We're able to tell if the fruits and vegetables are from Canada or the US. We know that the eggs and most of the dairy products are from regional sources. On the meat packaging, the country of origin, and sometimes the province, is indicated. We know that the roast beef comes from Western provinces. Often though, it's hard to tell where the food comes from. Our oats that we use for breakfast, for example, we have no idea if these are local. – Long-term care centre*
- *(Not really)...we order by code number from Sysco. – High School cafeteria*

When asked to estimate the percentage of their food purchases that came from Canadian, US, and other sources, most responded with the highest percentage of food coming from Canadian sources (20% - 70%), followed by US sources (20% to 50%) and other sources (10% to 40%).

h. Food Policies

Purchasing Policies

Survey participants were next asked to describe any purchasing policies which affect their food purchasing. The factors shaping food buying were expressed, in order of most to least mentioned:

Factors Shaping Food Purchasing	Quotes and Notes from Institutions/Restaurants
1. Budget	"We have a budget for the residents to stay within, \$7.68 per day."
2. Government Regulations	"We subscribe to the PPM 150 Schools Healthy Eating guidelines." "We abide by the Ministry of Health and Long-Term Care guidelines."
3. Corporate Policies/Factors	"(Our) purchasing choices are determined by the purchasing department at our food suppliers head office, based on availability, price, service, variety, quality, HACCP, insurance."
4. Quality	"We don't accept sub-standard food."
5. Food Safety	"We can only buy government inspected meat; eggs that are graded, etc."
6. Sustainability, Local and Organics	"Local and organics when possible."
7. Availability	Buying foods in proximity to institution/restaurant
8. Seasonality	"We buy foods that are in season."
9. Relationships	Focus on relationship-based purchasing

Food Safety Policies

When asked about which food safety policies their institution or restaurant adheres to, almost all survey participants that answered this question responded with the Eastern Ontario Health Unit Food Safety guidelines or the Hazard Analysis and Critical Control Points (HACCP) guidelines. All institutions adhering to the HACCP guidelines were hospitals or long-term care centres.

i. Local Food Procurement

Institutions were asked whether or not they currently buy and serve local foods, *produced or processed within SD&G*. 12 institutions or 41% of participants indicated that they currently served local foods.

**41% of SD&G Institutional Survey
Participants Currently Serve Local Foods
Produced or Processed in SD&G
(SDG Regional Food Assessment, 2013)**

Types of Local Foods Purchased

When asked about which types of local foods and local food products that they purchase, fruits and vegetables topped the list (14 responses total), with strawberries, corn, and beans most often mentioned. Meats and poultry products were the next most common response (6 responses), followed by cheese (3 responses). Some institutions indicated that they were unsure if certain products that they bought were locally produced or processed – such as bread, fruits and vegetables, and especially milk and other dairy products. These respondents indicated that in their ordering catalogues, it might simply say "produced in Ontario" (but perhaps be local), or that they buy a product made locally, but are not certain if any of the ingredients come from local sources.

Local Food Sources

Local food products bought by survey participants are most often purchased directly from a local farm or processor, followed by purchases made at grocery stores/retail outlets, food distributors, farmers markets, as well as being sourced from on-site, home or kitchen gardens. Most purchases were picked up at the farm or retail outlet, with very few deliveries made to institutions.



Bees from Levac Honey, Green Valley ON (Kittle, 2012)

Frequency of Purchasing

Hospitals and long-term care centres which purchased local foods tended to buy and use them on occasion, or once per week when in season; daycares, restaurants, and high school hospitality programs tended to use local foods on a monthly, weekly, or daily basis.

Promoting Local Food Usage

Of the survey participants which serve local foods, only 6 respondents or 50% indicated that they currently highlight the foods within their food programs in some way. These methods included: mentioning verbally to residents or clients the local foods on that day’s menu; mentioning local foods in yearly reports and/or monthly newsletters; highlighting local foods on menus; and highlighting local foods on a website or on social media platforms.

j. Interest in Serving More Local Foods

An overwhelmingly positive response was provided by survey participants when asked if they would be interested in serving more local foods and local food products. Twenty-two institutions or 76% of those surveyed stated “Yes”. One respondent indicated “Maybe”, while another declared that they would like to, but realistically with their current food budget, they felt that it would not be feasible.

Survey participants indicated that they would be most interested in serving more local fruits and vegetables, dairy products, meats, eggs, and grains.

Local Foods Interested in Serving	# of Responses
Vegetables	23
Fruits	23
Dairy products	14
Meats and Poultry	12
Eggs	11
Herbs	10
Grains	9
Bread	9
Fish	8
Maple Syrup	7
Honey	6
Gluten-free items	6

Baked goods	5
Coffee and tea	5
Prepared meals	2

Some of the comments on this question included:

- *Yes, certainly. If we could buy more local, we would. Even if prices were slightly higher -- we have the ability to work these purchases into the budget and could, for example, purchase local in moderation.*
- *If I was allowed, I would buy it if I could. I can't waver from Sysco.*
- *Yes (we'd like to serve more local food), in particular, fresh strawberries and sweet corn.*
- *I would like to, but I doubt the (food service) company would.*

Menu Flexibility for Local Foods

When survey participants were asked if they could build additional flexibility into their menus or snack food items to allow for seasonal local food, twenty-one institutions or 74% responded with “Yes”. Survey participants were asked to comment on the percentage of their budget that they felt they could allocate toward local foods, and this figure ranged from 10% to 80%

Prevalence of Local Food Purchasing Policies

All survey participants were asked if they currently had a “Local Food Purchasing Policy”. No participants replied that they currently had a policy in place which focused on buying local foods and/or denoted a certain percentage of foods which must be purchased locally. When asked about whether or not they would be interested in developing such a policy, two participants responded “Yes” and two also indicated “Maybe.”

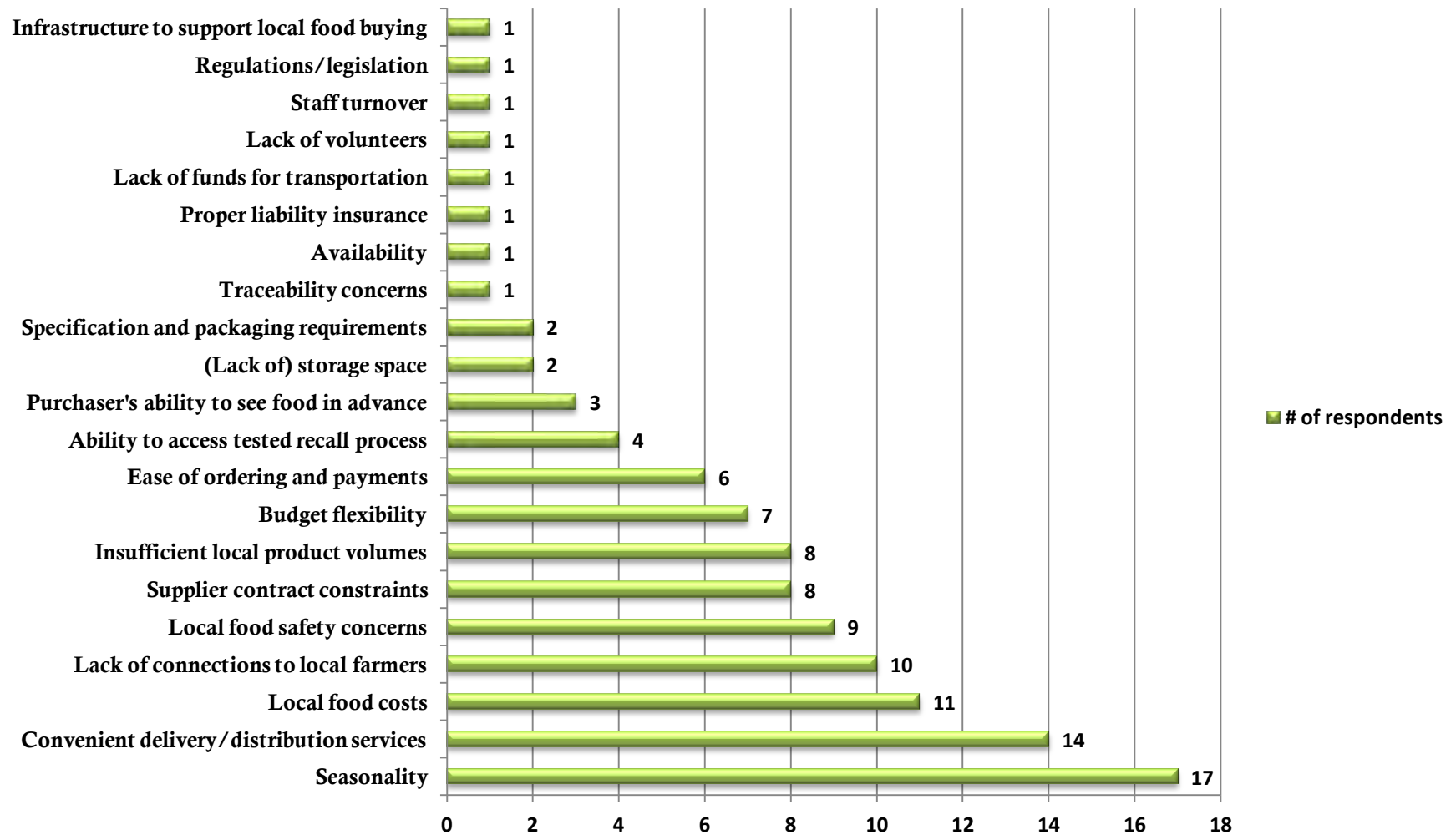
k. Barriers and Challenges to Local Food Buying & Serving

All institutions were then asked to comment on what they feel are the major barriers and challenges to sourcing and serving local foods. The results are summarized in the chart on the next page.



The 2nd Annual Eastern Ontario Local Food Conference in Kemptville ON, 2012 (Kittle, 2012)

Barriers to Local Food Procurement in SD&G: Survey and Interview Responses (2012)



Comments and questions from survey participants on the barriers and challenges to local food procurement included:

- *We would need to create a separate purchase order (PO) to buy from another vendor...the process to create a PO is fairly labour intensive.*
- *Seasonal menus, with last minute adaptations can be very costly and time consuming.*
- *We're not currently approaching farms, and the process/systems/infrastructure, etc. to support purchasing from local farms are therefore not in place.*
- *Would there be enough farms to supply all of our schools?*
- *The farms are farther away than the grocery store so often it saves time to just buy at the grocery store.*

Several producers also offered valuable commentary on institutional local procurement in the Producer/Processor surveys, included below:

- *Most local food producers are operating on a small scale and serve a niche clientele that is seeking a premium product. I am worried that low volume and high prices would be a large roadblock to selling to large institutions. The solution...policy change, increased budgets for healthy food, education, and ease of access would be needed.*
- *It all boils down to funding. All of the publicly funded institutions are under pressure to purchase the most affordable (cheapest) product available. And local is not the cheapest option out there.*

1. Supporting Local Food Procurement

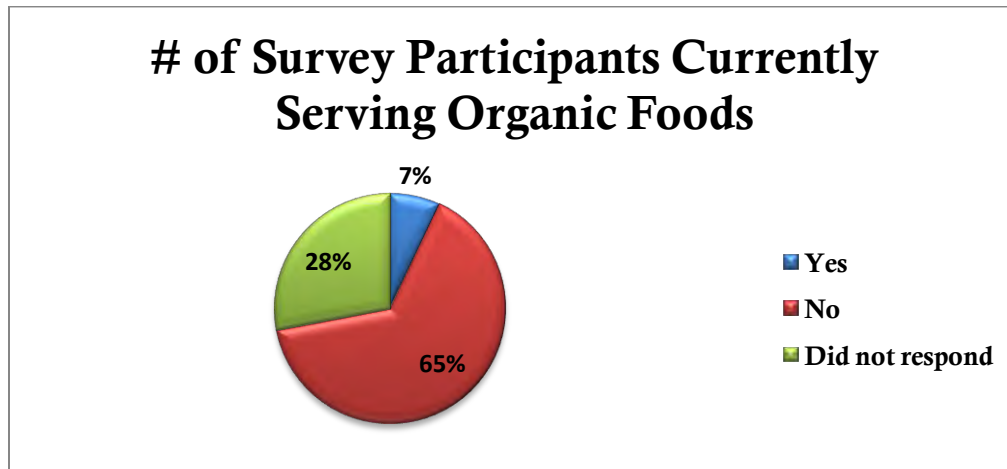
Institutions were then asked to provide suggestions on what they felt could help facilitate the process of sourcing and buying local food. The results are summarized in the chart below.

Recommendations to Support Local Food Buying by Institutions & Restaurants (2012)		
Suggestions Provided by Institutions	# of Responses	Comments
Making the connection between institutions and local food / Increased awareness of local food options	5	<ul style="list-style-type: none"> - <i>Providing a contact list of local suppliers</i> - <i>An online map with a search tool that displays the locations of schools and the farms, co-ops, food companies that are close to them</i>
Increased availability and/or accessibility of local foods	4	<ul style="list-style-type: none"> - <i>No comments</i>
(Local Producers) connecting with Food Services operators/Buying groups	3	<ul style="list-style-type: none"> - <i>If local producers and/or processors were to get in touch with the food distributors or the buying clubs to discuss selling their product to them, this could help to increase the amount of local food in institutions</i>
Lower and/or consistent pricing	2	<ul style="list-style-type: none"> - <i>No comments</i>
Infrastructure, such as a food hub or food co-op	2	<ul style="list-style-type: none"> - <i>A food hub to aggregate food; provide central coordination in terms of delivery, etc., storage space, and the ability to purchase in larger volumes</i> - <i>A local food co-op that would provide the ability to source a large and varied amount of local food on a weekly basis, and provide options for transportation</i>
Centralized ordering	1	<ul style="list-style-type: none"> - <i>No comments</i>
Proof of following HACCP procedures	1	<ul style="list-style-type: none"> - <i>No comments</i>

Local produce distributor in SD&G	1	- No comments
Effective communication	1	- Effective communication between various parties
Proven demand	1	- No comments
Making it easy to buy local food	1	- No comments
Funding		- Funding for pick-up and delivery of foods
Creating a culture of local food	1	- Creating a culture of local food in the schools: e.g. recipe contests, local food weeks, local food vouchers
Policy changes	1	- To encourage purchasing of local foods

m. Organic Food Serving and Buying Practices

Institutions were asked to describe their organic food buying and serving practices, and their interest in serving more organic foods. The results are summarized in chart format, below.



Only 7% of the participants surveyed – all restaurants - indicated that they are currently serving organic foods.

Respondents were then asked for their reasons for serving organic foods, or not serving organic foods. These reasons included:

Reasons why we choose to buy organic foods:

- Owner practices organic (1)
- It's the correct thing to do (1)

Reasons why we don't buy organic foods:

- Pricing is prohibitive / or perception that we would not be able to afford the food (5)
- Lack of demand from clients for organic food (3)
- Supplier contract constraints (1)
- Do not feel there is any real benefit or difference (1)
- No real perceived need for it (1)

SDG Regional Assessment (2013)



A wall mural in Glengarry District High School's Hospitality Class (Kittle, 2011)

Demand for Organic Foods

Survey participants were asked if there was a demand from their clients for organic foods; again, only a very small number - two respondents in total - indicated yes.

Interest in Serving Organic Foods

When asked of their interest in serving organic foods, or more organic foods, a significant number of survey participants (9 in total or 31%), including hospitals/long-term care centres, daycares, restaurants, high school hospitality/food programs, said yes. Twelve institutions or 41% responded no, while the remaining institutions chose not to respond.

Types of Organic Foods Interested in Serving

Institutions interested in serving organic foods indicated that they would be **most interested in serving organic fruits and vegetables, meats, dairy products, eggs, and grains.** .



A student and teacher helping with Rothwell Osnabruck High School's 2012 Farm-to-School lunch (Kittle, 2012)

Faces of SD&G's Food System

*Mountain Path Inc.,
Bob Hogg*

Mountain Path Inc., is located in Mountain, ON on a 138 acre farm south of Ottawa. Founded by Bob Hogg, a former English professor, Mountain Path has distributed certified organic and conventional dry foods and goods since 1983. Their priorities are selling products that are certified organic and local: "if it's [certified organic and] local, we'll buy it."

Types of products that Mountain Path distributes include: grains, nuts, dried fruits, legumes, spices, herbs, flours, canned goods, and eco-friendly/non-toxic cleaners. Many of the grains that Mountain Path mills and sells are from Eastern Ontario producers.

About 98% of Mountain Path's clientele is from Ottawa and the Valley, Guelph, Toronto, Montreal, and New York State. Only a small percentage of its business - approximately 2% - derives from SD&G.

Despite the current lack of demand for local and certified organic foods in SD&G, interest overall is growing yearly. MP hopes to expand its clientele to include institutions, and potentially expand its product line as well to include fresh foods.

Overall Highlights from Institutional/Restaurant Surveys and Interviews

- **Food suppliers:** A large and varied number of food suppliers are currently serving SD&G institutions and restaurants, with grocery stores and Sysco food services as the most popular suppliers. Many survey respondents are also a part of buying clubs, which help them to obtain competitive pricing on products.
- **Food expenditures:** Food expenditures for survey respondents varied from under \$10,000 to just under \$1,000,000. Most of the survey participants in the higher budget bracket were hospitals or long-term care institutions. All institutions in this bracket also followed a maximum daily allowance policy for their residents, ranging from \$6.34/day to \$7.68/day.
- **Where does the food come from?** About half of the institutions surveyed stated that they were knowledgeable about the origin of the food that they buy, while close to 50% of survey participants were unsure about food origins.
- **Purchasing policies:** Many institutions had food purchasing policies; food budget allowances, government regulations, and corporate policies/factors were the most commonly mentioned elements affecting food purchasing. Sustainability, local and organics were mentioned by two survey participants as factors shaping their food purchasing.
- **Current local food buying practices:** 41% of survey respondents indicated that they currently serve local foods produced or processed within SD&G, with fruits and vegetables mentioned most often. Most of these purchases are made directly from the farm or processing facility, and picked up by an employee.
- **Local food policies:** No survey respondents indicated that they currently had a “local food purchasing policy”, and very few respondents indicated interest in developing this type of policy.
- **Interest in serving local foods:** 75% of those surveyed stated that they would be interested in purchasing more local foods and local food products produced or processed within SD&G. When asked what types of foods they would be interested in serving, fruits and vegetables topped the list, followed by dairy products, meats and poultry, and eggs. 74% of those surveyed stated that they could build flexibility into their menus to allow for seasonal, local food buying, ranging between 10% - 80% of their overall budget.
- **Challenges to serving local foods & solutions:** When asked about the barriers and challenges to local food procurement, the most common response given was “the seasonality of local foods”, followed by “convenient delivery/distribution services”. When asked to provide solutions to increasing local food procurement, the most common response provided was to “make the connections between institutions/restaurants and local food” – whether through an online searchable map, a listing of local food suppliers, or other means.
- **Organic foods:** A very low number of survey respondents (two in total) indicated that they are currently serving organic foods. Nine respondents stated that they would be interested in beginning to serve or serving more organic foods.



(Left) An author reading by Robin Tunnicliffe, author of “All The Dirt: Reflections on Organic Farming” at the Cornwall Library in January 2012 (Gratton, 2012)

II. Producers and Processors Survey & Interview Results

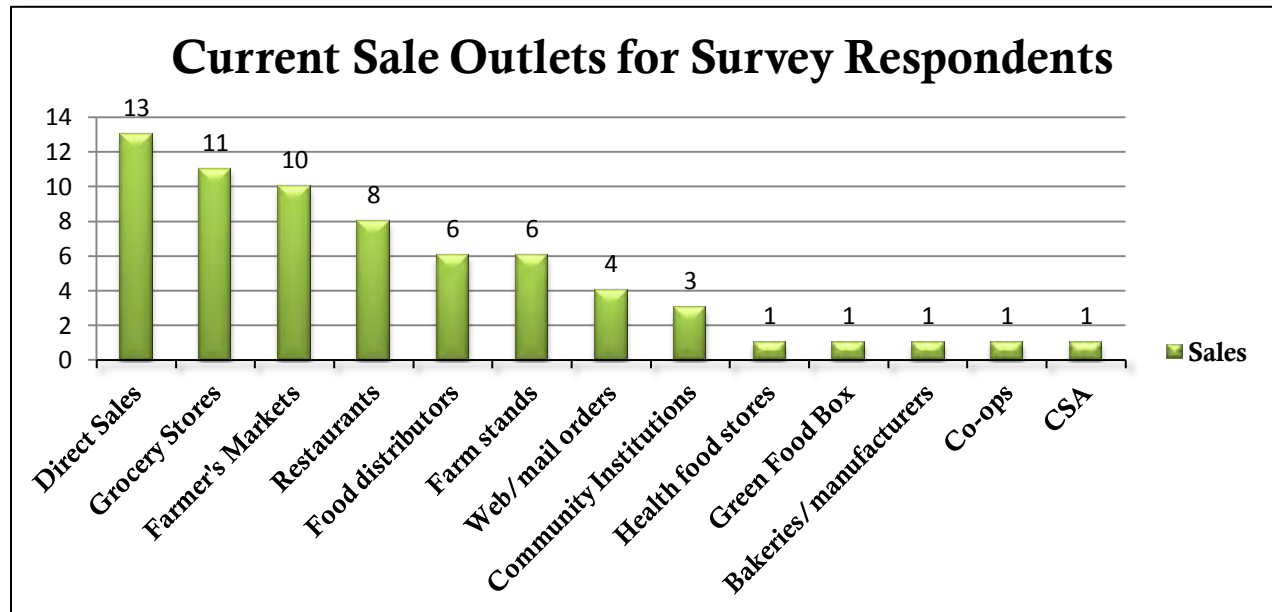
A high quality of responses was received from the SD&G producers and processors through the surveys that were disseminated, despite an overall low response rate (27%). Both conventional and non-conventional producers and processors were surveyed.

Types of Operations

Of the survey respondents, eleven producers/processors classified themselves as conventional; four as non-certified organic; one as a mixed (conventional/non-certified organic) operation; one as certified organic; one in-transition to organic; and two as “antibiotic and hormone free” and “other”.

Current Sales Outlets

Current sale outlets for survey respondents are primarily direct sales, with thirteen producers/processors indicating they sell their products directly to consumers; grocery stores (11); farmer’s markets (10); restaurants (8); food distributors (6); farm stands (6); web-marketing or mail orders (4); and community institutions (3). Lesser used sale outlets included health food stores, the Green Food Box, bakeries and manufacturers, co-ops, and CSAs (1 response per outlet).



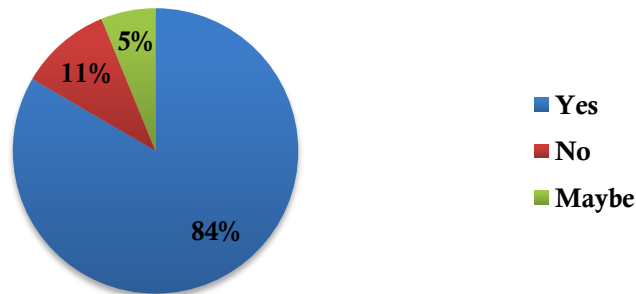
Interest in Selling to SD&G Institutions

Of those surveyed, all but three respondents (84%) indicated that they are interested in selling to SD&G institutions or interested in selling to additional institutions in SD&G. One survey participant responded with “maybe”, and two responded that they were not interested in selling to institutions. Those that responded no explained that they were satisfied with their current marketing outlets or concerned about the health regulations required to sell to institutions.

84% of Producer and Processor survey participants are interested in selling products to SD&G institutional markets.

SD&G Regional Food Assessment (2013)

Interest in Selling to Community Institutions among SD&G Producers and Processors

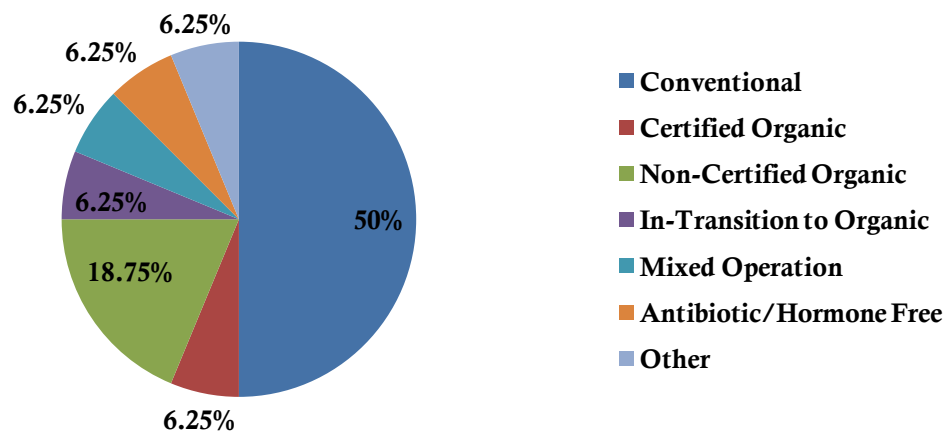


Of the sixteen respondents that are interested in selling to institutions, only three (19%) already sell to institutions. Thus, selling to institutions would open up an entirely new market for most of the survey participants.

Breakdown of the Types of Operations Interested in Selling to Institutions

The majority of those interested in selling to institutions are conventional producers or processors (50%). 6.25% of this group are certified organic; 18.75% are non-certified organic; 6.25% are in-transition to organic; 6.25% are mixed operations; 6.25% are antibiotic/hormone free operations; and 6.25% are other types of operations.

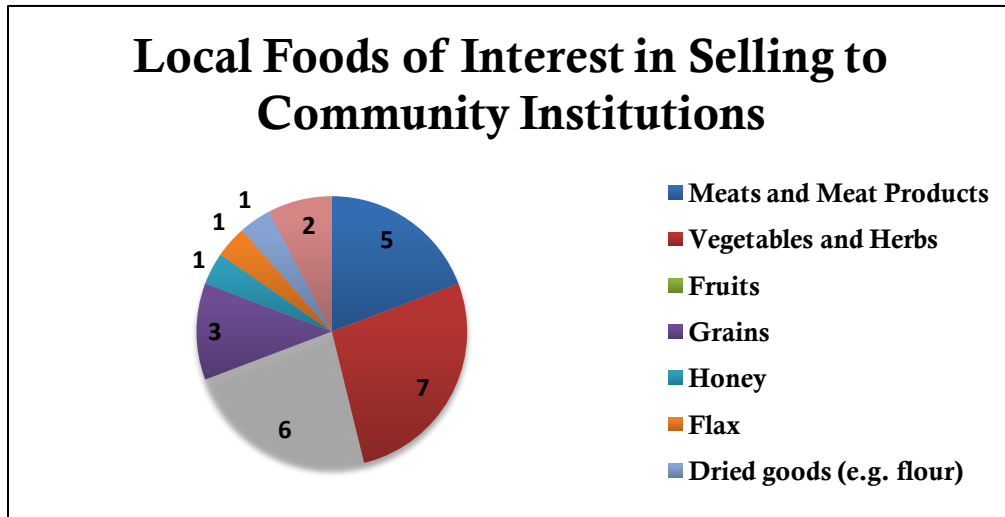
Breakdown of the Types of Operations Interested in Selling to Community Institutions



Most of these operations have been in existence for a significant period of time. Ten of the farms and businesses have been operation for over ten years; two between 6-10 years; and four between 1-5 years.

Local Foods of Interest in Selling to Institutions

The respondents interested in selling to institutions produce a wide range of local foods and food products, ranging from meats, vegetables, fruits, herbs, to grains, honey, and flax seed. A chart outlining the different types of products that this group is interested in selling to institutions is included below. Vegetables and herbs, fruits, and meat products topped the list.



Interest in Scaling Up Production

Respondents were asked if there are particular products that they are interested in selling in greater quantities, or scaling up production of. 89% of survey respondents stated yes, with fruits and vegetables mentioned most often, followed by meats, grains, seeds, legumes, eggs, dairy products, maple syrup and teas.

Highlights from Producer/Processor Surveys and Interviews

- **Survey Participation:** A majority of conventional producers and processing operations participated in the surveys, with the next most common operation being a non-certified organic farm/business.
- **Current Sales Outlets:** Direct sales to consumers and grocery stores were the most common sales outlets for survey respondents, followed by sales at farmer’s markets and to restaurants.
- **Interest in Selling to Community Institutions:** 84% or sixteen producers and processors indicated that they are interested in selling to Community Institutions such as schools, daycares, hospitals, and long-term care centres. Most of these operations are conventional farms or businesses. Of the survey respondents, only three producers/processors currently sell to institutional markets.
- **Products to Sell to Institutions:** Vegetables and herbs, fruits, and meat products were the top local food products that producers and processors are interested in marketing and selling to Community Institutions.
- **Scaling Up Production:** Respondents were asked if there were particular products that they were interested in selling in greater quantities, or scaling up production of; 89% of survey respondents stated yes, with fruits and vegetables, meats, and grains mentioned most often.

III. Connecting Supply and Demand: Distribution, Infrastructure and Procurement Policies

This section analyzes the distribution services, infrastructure, and policies in existence in SD&G which could help to connect the supply of local/regional foods with demand from institutional markets.

a. Distribution

To our knowledge, no distribution service currently exists in SD&G which focuses on the distribution of a variety of fresh, frozen, and dry regional and local foods. Within this niche sector lies a major opportunity to distribute regional foods to major institutions with proven demand, and to potentially many other markets, such as grocery stores and private businesses and industries.

Included below and on the subsequent pages is a chart outlining major food distribution companies currently servicing SD&G. These companies were discovered through speaking with different institutions which purchase from them; through Internet searches; through social media platforms; and through existing connections with these companies. Food distributors marketing locally grown, organic or certified organic products are highlighted.

Major Food Distribution Companies Servicing SD&G

Food Distributor	Product(s) Distributed to SD&G Outlets	Notes on Local, Regional, Organic, Sustainability
Agro Pur Co-operative www.agropur.com <ul style="list-style-type: none"> Quebec based; product ingredients derived from Canada, the US, and Argentina 	Distributes milk and dairy products (e.g. yogurt, sour cream, cheese)	<ul style="list-style-type: none"> The majority of ingredients are derived from Quebec farms, followed by Canadian farms, US farms, and Argentinean farms.
Betty Bread Commercial Bakery www.bettybread.ca <ul style="list-style-type: none"> Alexandria based (SD&G); unclear or where ingredients are derived from 	Prepares and distributes fresh bread, buns and rolls	<ul style="list-style-type: none"> Betty's has added a line of locally grown, milled and baked products, for specific customers. Customers are advised to contact the company for additional details on this product line.
Burnbrae Farms www.burnbraefarms.com <ul style="list-style-type: none"> Plants in Ontario, Quebec, and Manitoba; eggs are produced across Canada 	Distributes eggs and processed egg products through the company and also through other food distributors	<ul style="list-style-type: none"> All eggs are produced in Canada; many of the egg farms are located within Ontario
Canada Bread Company www.canadabreadfoodservice.ca <ul style="list-style-type: none"> Division of Maple Leaf Foods, chains across Canada (Ontario chain is Toronto-based); no mention as to where ingredients are derived from 	Manufactures and distributes "value-added and nutritious" fresh and frozen bakery products, including breads, rolls, bagels across Canada	<ul style="list-style-type: none"> No information found
Cardinal Meats www.cardinalmeats.com <ul style="list-style-type: none"> Toronto-based; no mention as 	Manufactures and distributes portion-controlled meat products	<ul style="list-style-type: none"> No information found

to where meats come from		
Desautels Foods Inc. <i>No website found</i> <ul style="list-style-type: none"> Green Valley-based (SDG); unclear as to where meats come from 	Distributes meat products	<ul style="list-style-type: none"> No information found
Kraft Food Services www.kraftfoodservice.ca <ul style="list-style-type: none"> Locations across Canada (Ontario location based in Toronto); unclear as to where ingredients are derived from 	Distributes Kraft cheese and dressings, barbecue sauces, and Tassimo products to food services	<ul style="list-style-type: none"> No information found on local/regional buying or organics; purchases coffee beans from Rainforest Alliance certified farms
Le Panier Osiris www.panierosiris.ca <ul style="list-style-type: none"> Eastern-Ontario based; products from Eastern Ontario, Canada, US, and around the world 	Distributes certified organic produce, dairy products, juices, coffee, meat, cereals legumes, etc to households, health food stores, and restaurants.	<ul style="list-style-type: none"> A large percentage of local, regional, Ontario, and Canadian products, clearly marked in the weekly order form.
Macartney's <ul style="list-style-type: none"> Ottawa-based; products are derived from around the world 	Distributes fresh produce, meats, dairy products, baked goods, grocery items	<ul style="list-style-type: none"> "Proud suppliers of our Canadian farmers selling local produce when available"
Mountain Path Inc. www.mountainpath.com <ul style="list-style-type: none"> Mountain-based (SDG); certified organic and non-organic products derived locally, regionally, and throughout the world 	Distributes primarily certified organic and non-organic dry goods including flours, grains, sugar, dried fruit, nuts, teas, coffee, granola bars, superfoods. Also carry fruit juices and other beverages, cleaning products.	<ul style="list-style-type: none"> Company is based on a 138-acre farm, and usually grows one crop per year that is sold to customers (e.g. buckwheat, rye). Strives to purchase as much product locally and regionally as possible.
Ontario Natural Food Co-op (ONFC) www.onfc.ca <ul style="list-style-type: none"> Toronto-based; natural and organic products with ingredients from around the world 	Distributes natural, organic and local foods and products (fruits, vegetables, soups, salsas, etc.)	<ul style="list-style-type: none"> Committed to contributing to a sustainable food system that supports the local Ontario economy and organic family community. Has a line of private label Ontario products – "Ontario Natural."
Organic Meadows Co-operative www.organicmeadow.com <ul style="list-style-type: none"> Organic Meadow products come from over 100 family farms across Ontario 	Distributes organic dairy products including milk, yogurt, cheese, kefir, ice cream, eggs, frozen vegetables and more	<ul style="list-style-type: none"> Committed to sustainable Ontario family farms and providing wholesome organic food
Parmalat Food Service www.parmalat-foodservice.ca <ul style="list-style-type: none"> Locations across Canada (Ontario location is based in Toronto); unclear as to where ingredients are derived from 	Distributes dairy products to food services, including milk, yogurt, cheese, butter, cream, etc.	<ul style="list-style-type: none"> No mention about a commitment to local/regional suppliers, organics, or food sustainability.
Quattrochi J & Co Ltd. <i>No website found</i> <ul style="list-style-type: none"> Smith Falls-based 	Distributes foods to SD&G and beyond; no data found on specific foods distributed	<ul style="list-style-type: none"> No information found

<p>Summit Foods www.summit.colabor.com</p> <ul style="list-style-type: none"> Operates 4 distribution centres, including 1 location in Ottawa; states on website that many of the products come from, or are processed in Ontario 	<p>Distributes over 14,000 food products, including frozen food, grocery, fruits and vegetables, and dairy products</p>	<ul style="list-style-type: none"> Summit recently received a Greenbelt Foundation grant to provide customers with local foods; Summit will be launching its “Embrace Ontario” program, as part of the grant, shortly
<p>Tannis www.tannisfood.com</p> <ul style="list-style-type: none"> Ottawa-based; carry 8000 products from over 400 manufacturers 	<p>Distributes a wide variety of products – from meats, grocery, dairy, fruits and vegetables, prepared foods, bakery, etc.</p>	<ul style="list-style-type: none"> Carries some products from Eastern Ontario farms/food processors, such as Skotidakis & Burnbrae Farms

Additionally, the following companies offer “food service” or “dining” solutions for institutions and restaurants in SD&G.

Food Service Companies Serving SD&G

Food Service Provider	Product(s) Distributed to SD&G Outlets	Notes on Local, Regional Organic
<p>Brown’s Fine Foods www.browns.ca</p> <ul style="list-style-type: none"> Kingston-based; state that they derive some ingredients and products from local farms; no other information found on sources of ingredients. 	<p>Fresh fruits and vegetables, whole grains, proteins, dairy products, baked goods, etc.</p>	<ul style="list-style-type: none"> Brown’s indicates that they buy local, promote local farmers, and are partners with Local Food Plus and Sustainability Kingston. The company also sells Rainforest Certified Alliance coffee.
<p>Compass Group (includes divisions such as Chartwell’s, Morrison, Eurest) www2.compass-canada.com</p> <ul style="list-style-type: none"> Several locations across Canada; no specific information on where products are sourced. 	<p>Fresh fruits and vegetables, frozen items, salads, sandwiches, snacks, vending selections, etc.</p>	<ul style="list-style-type: none"> Compass indicates that they are committed to working with local and regional suppliers to provide and promote local, seasonal products and menu choices. Locally grown produce currently represents 21% of their total produce purchases. Signed a sustainable seafood policy in 2008 Offer Fair Trade, organic coffee Purchase cage free eggs Offer organic products
<p>Gordon Food Services www.gfscanada.com</p> <ul style="list-style-type: none"> Several locations across Canada; offer ingredients and products sourced from around the world 	<p>Meat & poultry, seafood, prepared foods, fruits and vegetables, bakery, dairy products, etc.</p>	<ul style="list-style-type: none"> GFS is currently working with the Greenbelt Foundation to “expand its current list of 600 (Ontario) products primarily in the dairy, produce and protein categories.”
<p>Sysco</p>	<p>Meat, vegetables, coffee, dairy</p>	<ul style="list-style-type: none"> Sysco’s 2011

www.sysco.ca

- Locations across Canada; do not specify where ingredients/products are sourced from

products, eggs, baked goods, preserves, etc.

Sustainability report indicates that they have “well-developed **local foods programs** in at least 27 Sysco operating companies and moderately developed programs in another 21 operating companies.”

Local Producer and Processor Delivery Methods

In the producer/processor surveys, some respondents indicated that they currently used a third-party distributor to deliver their products to clients. While we did not ask producers to specify which distributor they use, we feel that it would be beneficial to research this in greater depth.

Many local producers and processors indicated that they currently deliver their products themselves to clients. Producers and processors which currently sell to food services, retailers, and institutions were asked to describe their delivery methods to each of these outlets; their responses are outlined in the chart below.

Current Delivery Methods to Food Services, Retailers and Institutions			
	Delivered by Producer/Processor	Delivered by a Third-Party Distributor	Delivered by a Co-op
Food Services (e.g. restaurants, caterers, hotels, etc.)	6	3	0
Retailers (e.g. grocery stores, health food stores)	11	4	1
Community Institutions (e.g. educational institutions, hospitals)	3	1	0

As the chart reveals, the majority of survey respondents which sell to food services, retailers, or institutions currently deliver their product themselves, while several use a third-party distributor, and only one respondent delivers through a co-operative.

Delivery of Product from other Businesses

Those surveyed were asked whether or not they currently deliver products from other producers or processors. Only two producers (11% of respondents) stated that they do this.

Institutional Delivery Methods

Respondents were asked to indicate if they would be interested in working with a food distributor, food co-operative, and/or a food service company to sell their products to institutions. The food co-operative distribution model received the highest number of votes (10 “yes” responses and 7 “maybes”). Food distributors and food service companies both received seven “yes” responses.

Interest in Delivery Options to Distribute Products to Institutions				
	Yes	No	Maybe	Did not respond/not applicable
Food Distributor	7	2	6	4
Food Co-operative	10	0	7	2
Food Service Company	7	2	5	5

b. Infrastructure

Local Foods Aggregation, Distribution and Storage

In SD&G, there is currently no major infrastructure that exists where a wide variety of local and/or regional foods are aggregated, stored and then distributed to buyers.

With many other communities across Canada and the United States experiencing this same gap, a common solution has been developed, with great success; **local or regional food hubs**. A presentation on Regional Food Hubs at the 2012 National Farm-to-Cafeteria Conference by USDA Agricultural Economist James Barham revealed that well over 200 food hubs are in operation across the US, with large clusters in the Midwest and Northeast. Average food hub sales are nearly \$1 million annually, and employ an average of 7 full-time and 5 part-time employees, with an average of 5 regular volunteers. Additional information on local and regional food hubs is provided in the “Challenges and Opportunities” section.

In our survey, we did not feel that it was the right time to ask producers or processors about their interest in developing or using a local food hub. It takes time to build a strong local food network that will enable the development and success of a local/regional food hub, and we didn’t feel that there was a strong enough network yet in SD&G. However, we did ask local producers about their current storage capacity, their interest in renting out storage space to other producers and processors, and their interest in accessing storage elsewhere, if it were economically viable.

The response rate for this question was lower than most other questions, presumably because a level of trust must be first established before producers and processors will share more personal information such as the information asked in this question.

Storage Capacity	Yes, I have this type of storage/not willing to rent out	Yes, I have this type of storage/willing to rent out	No, I do not have this type of storage	Did not respond
Freezer	4	1	6	8
Refrigeration	6	1	4	8
Cold Storage/Root Cellar	6	1	3	9

Due to the low response rate received for this question, it's unclear whether or not SD&G producers and processors have a high capacity for storage at their businesses. A subsequent question asked producers and processors if they would be interested in accessing storage elsewhere, if it were economically viable/affordable. The majority of survey participants responded no (63% or 12 responses), while seven producers/processors (37%) stated yes. On the whole, accessing additional storage does not seem to be a high priority at this time within the survey group.

Processing Facilities

To our knowledge, no facility exists within SD&G that processes a variety of local and regional foods and food products. These types of facilities are often seen in large urban centres or regions with a strong local food network and/or a large base of food entrepreneurs. Examples of these types of facilities include Vermont's Food Venture Centre and Toronto's Food Business Incubator.

There are several food processors in SD&G, where local producers take their products to turn them into value-added goods; for example, local meat producers often take their meats to outlets such as Greg's Meats (Winchester, ON) and Vogel's Meat Shop (Glengarry, ON) to produce sausages, hamburger patties, and other processed meat products for sale.

In addition, the Eastern Ontario Health Unit (EOHU) released an online resource in 2012 which lists all inspected food facilities in SD&G and Prescott-Russell. Interested producers can go through the categorized listing of facilities, which includes contact information for each location, and get in touch with these facilities to inquire about using kitchen space to process products.



An All Things Food workshop on "Extending the Harvest" taught by Shaun Funk of Redhead Pantry (Kittle, 2011)

In informal conversations with a variety of producers and businesses, it did not seem that there is a great knowledge of available facilities or a developed food processing network currently. It's also unclear whether or not many producers are accessing food processing facilities to create value-added products. In the producers/processors survey, participants were asked if they would be interested in accessing a food-grade facility within SD&G to process their products. Eleven respondents or 58% indicated "No", seven respondents or 37% stated "Yes", and one producer/processor chose not to respond.

When those who stated yes were asked to specify which types of processing they would be interested in, canning and flash freezing were mentioned most often (4 responses each), followed by baking (2), dehydrating (2), packaging (1), juicing (1), and slicing (1). Two producers who responded no to this question included comments on why they were not interested in processing; these producers stated they "had no need for this with the product that [they] sell", or that they "wish to sell product as is."

Processing therefore did not seem to be a major priority for most producers – presumably because producers are currently accessing a processing facility elsewhere, processing is not economically viable for their business at the moment, or they're interested in selling their product as is.

c. Local Food Procurement Policies

Of all institutions that were surveyed, none reported having a procurement policy set in place which prioritized buying local/regional foods. When asked if the institution would be interested in developing such a policy, very few (4 in total) indicated that they would be interested. These results are in line with the other survey data collected; few SD&G institutions are procuring many local foods and local food products at the moment, and the majority of local food buying that does take place is on a seasonal or occasional basis, largely due to restrictive budgets, food service contract restraints, and the availability and accessibility of local/regional food.

Local food procurement policies offer wide-ranging benefits to organizations and groups which adopt them. According to *Provincial Local Food Procurement Policy: An Opportunity for Manitoba*, increasing the demand for local food through government local food procurement policies can help “support local production, ensure that the agricultural industry generates greater spin-off benefits for surrounding urban centers...reduce environmental pollution and increase nutritional benefits...and help to reduce CO2 emissions throughout the entire food supply chain.”⁴³

Moreover, local food procurement policies are arguably necessary to develop a strong and diverse local food economy; the report from Manitoba found that “the development of a vibrant local food economy requires a diverse array of policy and financial instruments.”⁴⁴ The creation of a local food procurement policy invokes an intentional decision and commitment to health, supporting local farmers, minimizing one’s environmental footprint, sustainability, and re-building the food system.

Examples of organizations, institutions and businesses which have adopted local food procurement policies within Ontario include: the Municipality of Markham; the City of Toronto; and the University of Toronto. The Municipality of Markham for example, partnered with Local Food Plus (LFP) to purchase a minimum of 10% of its municipal services food from LFP-certified farmers in the first year, and increase that commitment by 5% every year thereafter.⁴⁵ A great opportunity and far-reaching short-term and long-term benefits await institutions, businesses, and organizations in SD&G, which decide to commit to procuring a certain amount of locally produced foods.

Faces of SD&G's Food System

*Glengarry Memorial Hospital,
Heather Buchan, Dietary Manager*

The Glengarry Memorial Hospital is located in Alexandria, ON and has a 38 bed capacity. The in-hospital food services serve patients, staff, and visitors an average of forty meals per day, seven days a week.

The menu is changed twice per year and is composed of 4 week menu cycles. Because of the hospital setting, specific dietary needs and restrictions need to be considered when developing the hospital’s menu. Clients have the freedom to choose from the daily menu and salad bar to best fit their tastes. GMH’s food services have won the Top Patient Satisfaction with Food Services twice (through LHIN).

GMH is a member of Health Pro Canada, a buying club which enables them to obtain competitive pricing for products. They receive most produce from a distributor, but have some flexibility within their purchasing to buy locally produced foods. Dairy, bread, and meat are sourced from regional businesses, and they have purchased local summer produce in the past. Sourcing local food is important to GMH. Produce from their on-site garden is also used in hospital programming.

Challenges and Opportunities in the Regional Food Value Chain

Gaps, Barriers and Opportunities

In this section, major gaps and barriers in SD&G's regional food value chain from both researchers' point of view are outlined. While additional challenges are certainly present within the value chain, due to time and space constraints, we chose to focus on what we consider to be five significant gaps and barriers to the development of a stronger local food system in SD&G. Following a discussion of these challenges, opportunities are highlighted, and examples of initiatives which have filled these gaps or removed these barriers in other regions are provided.

Gaps

1. Promotion and Celebration of Local Foods in SD&G

Currently there exists no ongoing promotion of local foods grown or produced in SD&G, or of the businesses and restaurants that offer them. A marketing campaign – “SDG Farm Fresh,” was developed in 2009-2010 by SD&G's Community Futures Development Corporation, however support for this campaign was discontinued. There are also very little known public celebrations of local food in the region.



The adoption of local foods marketing campaigns in the form of local food guides/maps, online local food search tools, local food finder ‘apps’ for smartphones, and ‘real food’ campaigns have been widespread throughout Ontario and nation-wide. The popularity of these campaigns is likely due to a high and growing demand for local foods. In a 2011 study on Canadian local food buying habits conducted by Équiterre, 78% of the survey respondents indicated that they preferred to buy local foods.⁴⁶ The survey found that seniors, retirees, people without children at home and people living in rural areas were significantly more inclined to buy local foods.⁴⁷

Équiterre's survey asked respondents about factors which motivated them to buy local products. “Better knowledge of the local products available depending on the season”

Faces of SD&G's Food System

Mike Dean's Super Food Stores,
Gordon Dean, Vice-President

Mike Dean's grocery stores have been serving Eastern Ontario for over 36 years, with four locations and a fifth store in development.

Dean's sources its food from over 520 food suppliers, including regionally-based suppliers such as Kraft and Parmalat. About 80% of their fresh produce is sourced from Toronto markets, with the remaining 20% deriving from Montreal markets. Suppliers are chosen for their dependability and customer demand for their recognizable brand-name products.

Though it is difficult to know the source of food products derived from major corporations, they do carry a wide selection of local food products, such as: cheeses from Eastern Ontario and nearby Quebec; maple syrup; Smyth's apples and cider (Dundela, ON); and breads from Nancy's Fancy (Alexandria, ON). Carrying local products is an opportunity to connect with the local community, and "differentiates us from the major corporate grocery retailers." Mike Dean's is eager to connect with more local producers and processors to bring local products to customers' grocery carts!

was highly ranked by respondents, with 77% indicating that this was a significant factor.⁴⁸ In the Community Food Workshops conducted throughout SD&G in October-November 2012, many participants indicated that they were unaware of the large variety of local food options throughout SD&G. This comment has also been echoed at many of All Things Food's events and activities. It's our recommendation therefore, that tools be put in place to increase awareness of the wide variety of local food options that exist in SD&G.

Opportunity

A well-designed **local/regional foods marketing campaign** in SD&G could significantly increase awareness of the availability of local foods and demand for these products. A **local food festival** would also be an excellent way to showcase the different local food offerings in the region; to connect consumers with producers; to celebrate the bounty of the region; to stimulate conversation around local food; to build community and connection around food; and to develop a strong local food network.

Inspiration

Successful local food campaigns and food festivals within Ontario that could be drawn on for inspiration include:

Local Foods Marketing Campaigns

- FoodLink Waterloo's "Find Local Good Guide" (print map, online search finder for consumer and wholesale markets, local food smartphone app)
- Just Food Ottawa's "Buy Local Food Guide" (print map and online search finder)
- Frontenac Region's "Savour the Arch Food Guide" (print map and online search finder)
- Peel Region's "Grown In Peel" (print map and online search finder)
- Guelph-Wellington's "Local Food Map" (print map, as well as digital copy)

Local Foods Festival

- Canadian Organic Grower's "Feast of Fields" Ottawa
- Guelph-Wellington's "Local Food Fest"
- Eastern Ontario Agri-Food Network's "Foire Gourmande"

2. A Regional Food Distribution Service

As outlined in the previous section, currently no distribution service exists within SD&G which aggregates and distributes a variety of regional/local foods and food products to households, businesses, food programs, or institutions. In order to source a variety of local food products, one must set up relationships with several local producers and either pick up the product themselves, or arrange for delivery. Though farmer's Markets can help to fill this gap in late spring, summer and early fall, this option is not available year-round, nor does it provide delivery of product. (A Co-op which formerly serviced SD&G and helped to fill this gap – "The Eastern Ontario Local Food Co-op" – is from the researchers' understanding, not operating at the moment.) While the option of taking a road trip to pick up a variety of local foods might work for some consumers, it's not feasible for many businesses or institutions.

Opportunity

A **regional food distribution service which** sells a wide variety of fruits and vegetables, meats, dairy products, grains, value-added products, and other items from local/regional producers could make it much easier for many individuals, businesses, and institutions to source and buy local food.

The following regional food distribution service has successfully filled this gap in Frontenac County (Ontario).

Inspiration: Wendy's Mobile Market

Nearby in Lyndhurst, ON, a woman named Wendy Banks has created a successful regional food distribution service –“Wendy's Mobile Market”, supplying households, restaurants, and other outlets with a wide variety of local, regional and organic products from over 70 producers. Wendy offers products ranging from milk and cream from Kingston's Limestone Creamery, to gourmet preserves from Merrickville's Mrs. McGarrigle's, to apples from Brockville's Hall's Apple Orchard, and red fife flour from Gananoque's Iron Wood Gardens.



Wendy Banks and husband Rick Trudeau beside their Mobile Market truck (Source: Food Down The Road)

A quick glance at the Mobile Market's offerings makes one not only salivate at all of the delicious items available from local producers and food businesses, but it also makes one think of the incredible opportunity it provides for consumers and businesses to source a large variety of items from one business. Wendy recently won the Premier's Award for Agri-Food Innovation Excellence for her mobile market, and has added a retail location in response to growing consumer demand for local food.⁴⁹

3. A Regional Food Hub

There currently exists no infrastructure in SD&G where a wide variety of local/regional foods and food products are aggregated, and then distributed to consumer, retail, wholesale and institutional markets. This type of infrastructure is commonly known as a regional or local food hub - “a business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail and institutional demand.”⁵⁰

While little known research has been released on Canadian food hubs to date, the USDA released a Regional Food Hub Resource Guide in 2011 which profiled the nascent industry. Well over 200 food hubs are in operation across the US, with average sales of nearly \$1 million annually.⁵¹ The study also found that the median number of food suppliers to a food hub



A map profiling the different locations of regional food hubs across the US (Source: USDA Regional Food Hubs PowerPoint, 2012)

is 40, many of whom are small and mid-sized farmers.⁵²

According to the USDA's Agricultural Marketing Service, regional food hubs have the potential to:

- Increase producer access to larger volume markets
- Fill gaps in distribution, processing, and marketing infrastructure for producers
- Particularly for mid-size operations – the “ag of the middle” , regional food hubs can help to support/retail these operations which are too large to rely on direct marketing channels as their sole market outlet, but too small to compete effectively in traditional wholesale supply chains effectively
- Encourage small operations to scale up; and
- Satisfy the growing demand for local/regional foods⁵³

Opportunity

A multi-faceted regional food hub in SD&G could have enormous potential to support all sizes of farms in SD&G in marketing, distributing, and processing their products; to offer a wide variety of regional/local food products for sale to consumer, retail, wholesale and institutional markets; to promote the benefits of buying and eating locally; and to offer a wide variety of other services, like the “Virginal Local Food Hub” does, outlined below.

Inspiration: The Local Food Hub, Virginia

If you're looking for an example of an inspiring local food hub, look no further than “The Local Food Hub” located in Charlottesville, Virginia. This non-profit local food hub was started by two female entrepreneurs in 2009, and strives to “strengthen and secure the future of a healthy regional food supply by providing small farmers with concrete services that support their economic vitality and promote stewardship of the land.”⁵⁴

The local food hub offers many different services, but primarily operates a local food warehouse, where it purchases and aggregates locally grown produce from over 70 farms in the region. This food is distributed to a variety of markets, including schools, hospitals, grocery stores, seniors centres, colleges, caterers, and more. Moreover, the food hub produces more than six acres of organically grown food for production and donation;

Faces of SD&G's Food System

North Dundas Community Co-op

Cheryl Beasley, Co-President

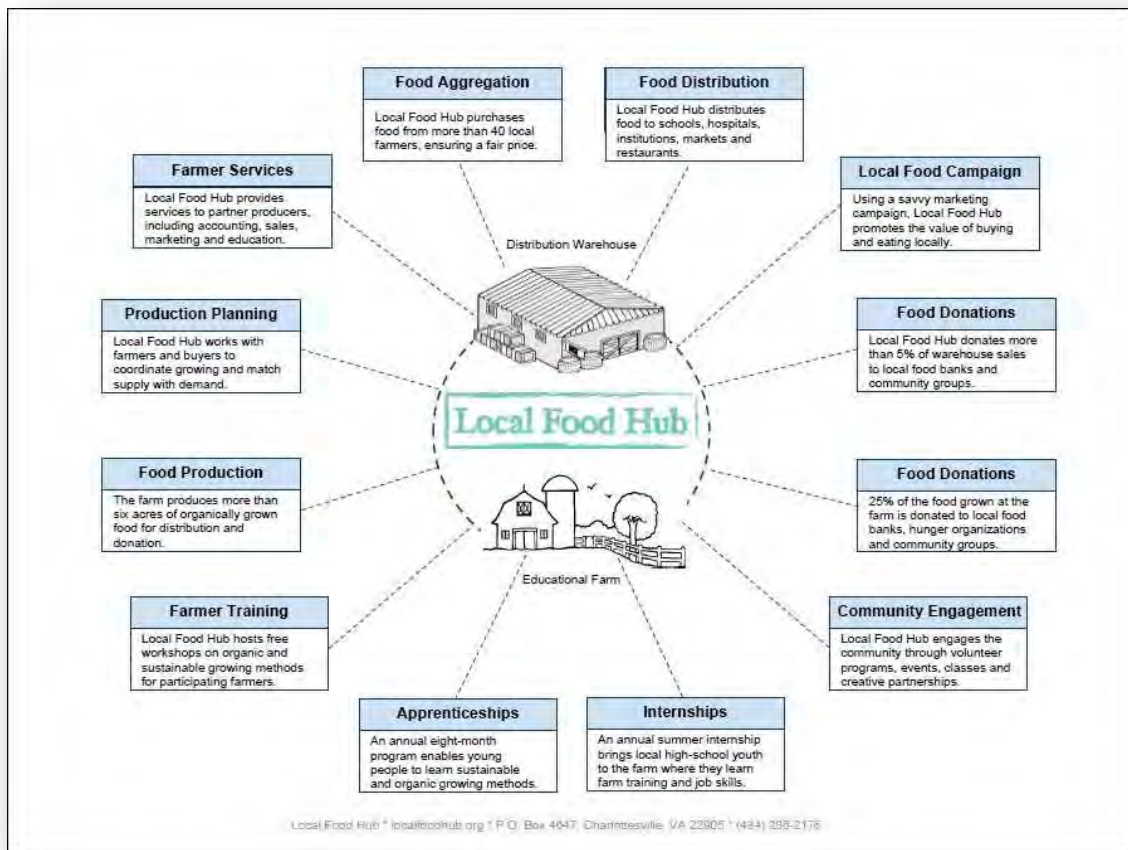
The North Dundas Community Co-op was formed when vendors at the Chesterville Farmer's Market sought to extend the season of the market. Approximately ten vendors currently offer products for sale through the Co-op. The order list is published every Monday on the Co-op's website, and orders can be placed until Wednesday; products are then sent to a central location for pick-up on Saturday.

A mix of organic and conventional products are offered for sale each week, and include baked goods, preserves, salsas, honey, vegetables, fruits, meats, and gluten-free items.

The Co-op appeals to regular customers who want to enjoy local products year-round. Through the Co-op and market, strong networks and relationships have developed between the vendors and customers.

Though the Co-op is serving its purpose of extending the season, the organizers are also looking to increase awareness of the Co-op in the community, lower or eliminate the fee to join, increase its client base, and find a more central pick-up location to improve accessibility. Eventually, they are hoping to connect with the Green Food Box and institutions to supply

develops local foods marketing campaigns; hosts free workshops on organic and sustainable growing methods; offers apprenticeships and internships at their educational farm; engages the community through different programs, events, and classes; and donates food to local food banks and other organizations.



The Local Food Hub's Programs (Source: USDA's Regional Food Hubs PowerPoint, 2012)

In terms of profits, the Local Food Hub grossed sales of \$350,000 in 2010, and their projected gross sales for 2011 were more than double than that of 2010, estimated at \$675,000. Producers have increased farm sales by an average of 25% since working with the hub, and 60% of the producers plan to increase production.

Furthermore, the hub has reinvested over \$850,000 in the local farming community, and created fifteen paid jobs at their distribution and farm operations. An average of a 30% increase in local food purchases was reported by the 120 active food hub buyers. As one of 200 food hubs now in operation across the United States, 60% of which are 5 years old or less, these operations are evidently filling a major gap in regional food systems.

4. Government Support for Sustainable Food Systems

Strong and consistent federal, provincial, and local government support for sustainable local and regional food systems could have a significant positive impact on our food system. While there has been funding support from the provincial government for regional/local food systems in the past, such as the Ontario Market Investment Fund and the Greenbelt Fund, and the provincial government recently showed its support for local food through the Ontario Local Food Act, we

believe that strategic funding and support, in line with a National or Provincial Food Strategy, could be a greater force for positive change.

Opportunity

While every community's food system in SD&G has different needs, below are several ideas on how municipal governments could support the development of sustainable food systems in SD&G:

- Adopting a local food procurement policy for local food purchases made by the municipality
- Including food in their economic development strategies; working with existing food producers and food businesses to support their current operations (e.g. help with finding grants, loans, etc.); support producers/businesses who desire to scale up their operations; design effective marketing strategies to secure new investment in the local food sector
- Create a Food Policy council
- Fund regional food security groups and their initiatives

Inspiration: Woodbury County Iowa's County Government

Woodbury County, Iowa is one example of a community whose local government is playing an active role in shaping a sustainable regional food system. Woodbury has similar traits to SD&G – it's both rural and characterized by a large number of conventional farms.

From 2005 – onward, its local government decided to make a strong commitment to supporting organic and local agriculture as an economic development strategy.⁵⁵ The County offered property tax rebates to farmers transitioning to organic agriculture (up to \$10,000 a year for five years); established a public campaign for healthy lifestyles, that included a mobile farmer's market and school cooking classes using fresh, local ingredients; and passed a local food purchasing policy, requiring county food services to buy food grown and processed within 100 miles, with a preference for organics. The result: the number of active producers at the farmers market doubled, and sales for farmers increased about 20%.⁵⁶

Barriers

1. Restrictions faced by potential major purchasers of local food

Public sector institutions, including hospitals, schools, daycares, senior's homes, and other institutions, have great potential to be major buyers of local foods. Unfortunately, at the moment, many of these institutions face many barriers to local food procurement. These barriers were documented throughout interviews and surveys with SD&G institutions, with restrictive food and staffing allowance budgets; supplier contract budgets; food safety requirements; and the availability and accessibility of local foods expressed as the largest barriers.

While it's unknown when or if the Ontario government's institutional food and staff budget allowances will increase, and many local institutions' food supplier contracts vary greatly, throughout our research we felt that there was still hope despite these challenges. Most, if not all institutions are interested in serving and buying local food, and many provided a percentage of their budget that they felt they could allocate toward these purchases. In addition, some institutions are growing their own food on-site; arranging tours to local farms for clients and students; and using local food in celebratory events.

Opportunity

How can we do more to bring local food into SD&G institutions, despite the barriers? Below are a few opportunities that could be catalyzed on and instituted for greater procurement of local foods in institutional markets:

- Working with both interested distributors, such as Mountain Path Inc., who wish to help bring local foods to institutional markets, interested buyers, who wish to source a greater amount of local foods, and agencies which specialize in this area of expertise, such as Local Food Plus. Projects could include:
 - Building relationships amongst all groups
 - Commitments to, and the development of local food procurement policies
 - Applying for collaborative grants to assist with funding needs to support the local food buying process
- Seeking out opportunities to collectively advocate for increases in institutional food and staffing budgets; or, propose a specific government fund devoted to providing funds to procuring local foods, and the infrastructure and skills development required to prepare them

Inspiration: The Scarborough Hospital

In 2011, the Scarborough Hospital received a \$191,000 grant from the Greenbelt Fund to develop the “ReFRESHing our Menu” project, adding more fresh local food cooked from scratch to inpatient meals. The hospital also upgraded its kitchen facilities, introducing a new bedside ordering process, and trained staff on scratch cooking methodologies. Furthermore, it worked to build awareness amongst its patients, visitors, staff and community about the importance of fresh, healthy, local food to wellness, and the positive impact buying local has on the economy and environment. To assist with instituting its local food procurement system, the hospital partnered with Local Food Plus and 100km Foods Inc..⁵⁷



(Left) A picture of fresh corn muffins and a vegetable frittata, prepared as part of Scarborough Hospital's "ReFRESHing Our Menu" Project (Source: CBC News)

2. Legislations & Regulations

According to the Canadian Value Chain Management Centre’s 2010 Report *Increasing the Market Opportunities for Local Food*, there are numerous regulatory barriers limiting the development of profitable local food distribution systems in Canada.

The authors explain that, “While federal, provincial, and municipal governments are encouraging consumers to choose local food, legislation implemented by those same levels of government often works against businesses wishing to take advantage of consumer’s increasing interest in local food.”⁵⁸

These barriers, outlined by the report, can be found in areas including but not limited to:

- the direct marketing of local foods such as eggs and milk
- federal vs. provincial licensing of meat plants and their effect on limiting producers’ access to markets; and
- changing the packaging of local foods products (affected by numerous acts such as the *Canada Agricultural Products Act*, *the Food and Drugs Act*, and *the Consumer Packaging and Labelling Act*)

Opportunity

The opportunity to collectively advocate against challenging and prohibitive legislations and regulations is increasing, with the growth of the local food movement and local food organizations across Canada; the opportunities afforded by the Internet and social media tools; and the recent commitment of the Ontario provincial government to local food systems.



The House of Lazarus Giving Garden (2012)

Inspiration: Food Policy Councils & National Food Networks

Regional food policy councils and a national sustainable food systems network are two excellent spaces where collective advocacy work on prohibitive legislations and regulations within the food system can be done. There are ten known food policy councils in Canada to date, fourteen additional Canadian groups which focus on food advocacy⁵⁹, and a recently developed Canadian Farm-to-Cafeteria and National Sustainable Food Systems Networks. Developing a food policy council in SD&G would afford the opportunity to discuss and promote policies which support local food, and advocate as a group for supportive policies at the provincial and national level.

3. SD&G's Geography & Climate

SD&G's mainly rural geography and climate can both be viewed as barriers to the development of a strong local food system. Accessing a wide variety of local foods in a rural area, without a central local food hub or a local foods distributor, is difficult. (To give a sense of the size and breadth of SD&G, its total land mass is approximately 600 km² larger than the city of Ottawa, but with a population eight times smaller.)

Furthermore, a shorter growing season – roughly from May to October - means that not all local foods are available during the off-season; this is often seen as an inconvenience by buyers who desire a consistent product. While there are certainly some locally produced foods available in the wintertime in the region – such as meats, cheeses, maple syrup, winter squash, and teas - one still runs into the problem of having to drive to quite a few places to source all of these items.

Opportunity

How can we overcome the barrier of a rural geography and a shorter growing season? These are questions that could be answered by having strategic conversations around this question and others – potentially in the context of developing a **Strategic or Action Plan on Food for SDG**. Niche markets could be tapped into by growers interested in starting **greenhouse** operations or **year-round CSAs** to fill the gaps in local food in the wintertime and early spring; **community root cellars** could be developed to create infrastructure to store local foods all year long; **courses on “year-round gardening”** could be provided; and local foods distribution could be discussed.

4. Attitudinal Barriers

Certain attitudes about foods can be viewed as barriers to the development of a stronger local food system. The general attitude to buy foods based on price points, for example, is a detriment to supporting a liveable income for our local farmers. When compared to other countries, Canadians spend one of the smallest percentages of their income on food – calculated at an

average of 9.1% in 2011.⁶⁰ The infographic below from Washington State University depicts the disparities in percentages of income spent on food across the globe, with Canada estimated at one of the lowest percentages (9.1%).



We propose changing one’s mindset to becoming more comfortable to paying more for nourishing, local foods; this could mean a change in budget priorities for some. For those who are frugal, growing one’s own food is always an option, as well as being mindful of food purchases – buying less expensive grains for example, such as millet over quinoa. It’s also important that we be mindful of those with limited incomes and/or in need, and share the bounty of good food with others as we’re able.

5. A Lack of Incentives to Choose Sustainable Agriculture as a Career

If someone were to tell you that your chosen career would generally be a 6-7 day workweek, with few holidays; that you would be compensated minimally; that it would involve a great deal of physical labour and many unknowns due to factors out of your control; and potentially huge amounts of debt - would you be excited to take up this career? Though these factors do not exist for all farmers, some or all of these factors are a reality for many today. Farming is a far less chosen career than it once was, and according to Ontario’s Farm Start, “this will mean the disintegration of the social fabric of rural communities and the long-term stewardship of our farmlands unless there are new and young farmers take their place.”⁶¹

The Context

The National Farmers’ Union 2011 Report: *Farms, Farmers, and Agriculture in Ontario* shows that over the past 30 years, Ontario has lost about half of its many mid-sized farms. The report reveals the major disincentives to taking up farming as a career in this generation:

- **Existing government policies** – “...it is clear that the present policy emphasis on trade and export markets is not benefitting family farmers... as a province, we import more than we export in all products, except live animals.”
 - **Income** – “In spite of rising food prices in the grocery store, the prices farmers receive have remained low and fairly constant.”
 - **Debt** – “[The] debt-load [for farmers] is steadily increasing.”
 - **Requirement of additional employment** – “Ontario farm families depend heavily on off-farm employment for survival.”
- Source: “Small Farms Disappearing in Ontario, NFU Warns” (June 8, 2011)*

Additional disincentives certainly exist, such as the cost to start up one’s own farm; with a trend toward larger farms, and less land now available, good and affordable land is hard to come by.

But is there hope in forming a new generation of farmers? Indeed, several organizations in Ontario are working on this issue and are beacons of hope amidst this startling reality. Below are profiles of just some of the groups engaged in working on new farmer projects and issues, which could inspire similar work in SD&G:

Inspiration: Farm Start, Farm Link, Farms at Work, and Just Food Ottawa

- **Farm Start** (Ontario-wide): Farm Start’s goal is to “encourage and support a new generation of entrepreneurial ecological farmers.” Farm Start’s programs include: developing Start Up Farms (such as the Incubator Farm in Guelph), providing seed capital, and training and resources. (www.farmstart.ca)
- **Farm Link** (Ontario-wide): Farm Link is a “matchmaker tool to bring together new farmers who are looking for land or mentorship with farm owners who have land available or expertise to share.” After a quick search on the “Find a Farm” tool for new farmers, 163 farms came up, an impressive base of farms participating in the fairly new connections program. (www.farmlink.net)
- **Farms at Work** (East Central Ontario): Farms At Work’s mission is to “promote healthy and active farmlands within the region of east central Ontario”. Some of the projects that Farms at Work is engaged include: attracting and supporting farmers new to the region; ensuring access to local training opportunities; and supporting access to farmland by new farmers. (www.farmsatwork.wordpress.com)
- **Just Food Ottawa** (Ottawa): Just Food coordinates a variety of farmer-to-farmer training workshops and recently began offering the “Exploring Your New Farm Dream” course in partnership with Farm Start. (www.justfood.ca)



A recently made film profiling five new, young farmers across Canada, “To Make a Farm,” was a big hit among viewers. (Source: To Make a Farm website)

Four Strategies for a Stronger, More Sustainable Food System in SD&G

Four strategies to achieve a stronger, more sustainable food system in SD&G were developed by the researchers' of this report, based on what we heard, understood, read, and saw throughout the Assessment process, and on our knowledge and experiences on food issues and projects in SD&G and beyond. These four strategies are described below.

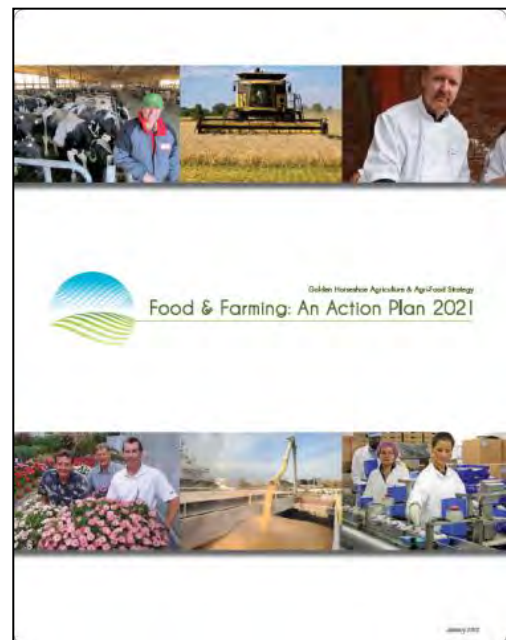
1. Strategy #1: The Development of an SD&G Action Plan on Food

Developing an “Action Plan on Food” for SD&G is an organized approach toward strengthening our local and regional food economies, ensuring the health of our community and our collective food security, and building community and connection around food.

The plan’s development would engage all sectors of society in thinking critically about what they desire their food system to look like. The plan would be comprehensive in nature, touching on a wide variety of community issues relating to food, and would also be strategic, planning towards achieving a set of specific outcomes outlined by stakeholders. As there are evidently major differences in the food system within different regions in SD&G, specific community action plans could be included within the plan. Nonetheless, the goal would be to engage all regions in SD&G in planning for collective food security and a stronger, sustainable local food system within SD&G and their community.

Action plans to look to for inspiration include:

- The Golden Horseshoe’s Agriculture and Agri-Food Strategy’s “Food and Farming: An Action Plan 2021” (January 2012)
- Just Food Ottawa’s “A Food Action Plan for Ottawa” (June 2011)
- Metro Vancouver’s “Regional Food System Strategy” (February 2011)



*The GTAAC's Food & Farming Action Plan
(Source: Ontario Fresh, online)*

To ensure collaboration from a wide range of individuals, organizations, institutions and businesses on this initiative, as well as the success of any major endeavour related to food in the region, we feel that Strategy #2 must also be achieved concurrently.

2. Strategy #2: Building a Stronger Regional & Local Foods Network

Building a comprehensive and strong regional and local foods network – founded on relationships based on understanding, trust, information and resource sharing, between all partners across the food value chain, is required to further develop a more localized food system within SD&G.



The Food Value Chain (DreamingNewMexico.org)

Since 2008, All Things Food has been fulfilling the role of a local food/food security network in SD&G. Several other organizations and associations dedicated to farming exist within the region – such as the OFA, Cattlemen’s Association, NFU, Soil & Crop Association, and others, as well as other groups whose mandate includes food projects and/or food security, such as Linking Hands Dundas County and The Social Development Council of Cornwall and Area. To our knowledge however, no other network or organization’s overarching mission is to work towards the collective food security of SD&G and the development of a sustainable and resilient food system within the three counties.

While All Things Food’s member base is comprehensive and continues to grow, and we’ve accomplished significant achievements in terms of advancing food security in our communities, we feel the need to be strategic to continue to grow this Network, and engage as many persons as possible in the conversation on developing a sustainable food system. We recognize that our current membership and meeting structure – regular e-mail communications, phone calls and quarterly face-to-face member meetings – do not permit all types of persons to attend and contribute to the discussions.

To enlarge and develop a more comprehensive and strong local/regional foods Network, we must go outside of the Network structure to make connections with and between other partners in the regional value chain, and engage a wider number and variety of people in the discussion.

To grow a larger local food network within SD&G, we feel that the following elements will be required (notwithstanding additional factors):

- **Securing long-term funding** to realize this goal and its associated activities
- **A strategic plan** to engage a wider amount of persons in the conversation around developing a more localized and sustainable food system
- **Regular meetings and conversations with and between local food champions in SD&G.** Several local food champions within SD&G are keen to scale up the local food system in SD&G, with specific projects in mind that focus on sustainable food production, aggregation, sales, and distribution. These include, but are not limited to, Homestead Organic’s *Organic Central* project, and Mountain Path Inc.’s desire to grow its distribution customer base and potentially expand into distributing fresh products.
- **Regular face-to-face meetings and connections between a variety SD&G local food stakeholders:** Face-to-face meetings with and among a variety of local food stakeholders in SD&G will be invaluable to building understanding, trust, and relationships between the different members of the value chain.

“Our philosophy is that the most meaningful networks...involve people coming together face-to-face to build relationships and, more broadly, community.”

— Building Local Food Networks, Eco Trust

These meetings can include All Things Food Network meetings, but also seeking out other relevant farming and food meetings and gatherings in the region to join in and be a part of. Participating in these meetings will help to understand the role of each group and/or individual hosting the meeting, and discover how we can work together toward the common goal of a stronger and more sustainable food system. All Things Food could also be responsible to develop events among local food stakeholders, such as *Farmer-Chef Connections* or networking events to bring together institutions with local food providers.

- **Regular communications via various communication platforms** – Regular communications around food in SD&G will help to keep food fresh in the minds of community members, provide notifications on educational and skill-building opportunities, offer a platform for information and resource-sharing, and much more. A newsletter and other communications vehicles sent out on a regular basis will help to strengthen the food network within SD&G.

- **Working with regional partners**

As we’ve discovered, our regional partners in Ottawa, Kingston, Perth and beyond are incredibly valuable resources, hold many opportunities for mutually beneficial partnerships and projects and as a collective body – “*The Eastern Ontario Local Food Collaborative*” – are a proven strong platform for advocacy. We feel that a continued focus on developing relationships with regional partners, and working together to advance common goals, is key to a strong food network.

3. Strategy #3: The Development of Regional Food Working Groups

Developing regional food working groups, based on relevant food issues and topics in our food system and sufficient community interest, could help to advance our collective food security in a powerful way. Working groups would engage stakeholders in discussion around a particular topic and work towards tackling the issues at hand. The groups would be supported by the All Things Food Network and liaise with the Network on a regular basis to provide updates and seek feedback on their initiatives.

Working groups could be formed on the following topics, with examples of issues within these topics, all of which were raised during the research process:

- **Awareness/Education** – e.g.: Developing educational materials on the benefits of sustainable food systems; promoting support for liveable incomes for farmers
- **Food Access** - e.g.: Ensuring local and organic foods are available to all community members, regardless of income level
- **Food Distribution** - e.g. Developing a food co-operative or food distribution system for SD&G; conducting a feasibility study for a regional food hub
- **Food Literacy** – e.g. Promoting a focus on sustainable food systems in educational curriculums. at all school levels
- **Advocacy** – e.g. Advocating for support for food security initiatives and local and sustainable food systems; for increased funding for institutional food and staff budgets; for a food focus throughout municipal and county planning and economic departments

- **New Farmers** – e.g. Working with groups already formed to work on this issue, and determine ways locally to encourage youth and young adults to take up sustainable agriculture as a career

4. Strategy #4: The Promotion and Celebration of Local Foods in SD&G

The rebirth of a local foods campaign and the celebration of local foods in SD&G could be a catalyst to working towards and achieving much of the above-mentioned work, by putting food on the minds of many, enabling a greater enjoyment of local foods, and sparking creativity and festivity around food. Furthermore, having greater knowledge of the variety of local food sources, of the outlets selling and serving local foods, and of the gaps within the food system, could spur a greater demand for local foods as well as new entrepreneurial food ventures.

All Things Food proposes the re-development of an “SD&G local foods guide and map”, an online search finder for both consumers and larger buyers (such as institutions, restaurants, and other businesses), and an annual celebration of the local foods bounty in the region. A local foods “app” could also be developed for smartphones in the future, if sufficient interest in this option was seen. We feel that these marketing and educational efforts could go a long ways toward bringing food to the forefront of community discussions and promoting a re-focusing on food in all spheres of society.

What **YOU can do to help create a stronger, more viable, Community Food System**

- ✓ Choose a diet of locally grown and processed foods (Eat locally, seasonally, regionally);
- ✓ Ask food stores and restaurants to buy from local processors and producers;
- ✓ Ask where food items are sourced from;
- ✓ Shop at farmers' markets, food co-ops, and local food distributors;
- ✓ Buy a share in a CSA or Good Food Box Program;
- ✓ Participate in a community/school garden; share excess produce with neighbours or soup kitchens, etc;
- ✓ Support policies that favour local food, farms, and the community food system;
- ✓ Join or support a community food policy council.

(A Primer on Community Food Systems: Linking Food, Nutrition, and Agriculture, 2006)

Glossary of Key Terms

- **community food security:** A strategy for ensuring secure access to adequate amounts of safe, nutritious, culturally appropriate food for everyone, produced in an environmentally sustainable way, and provided in a manner that promotes human dignity. (*OPHA, 2002; Pothecuchi and Kaufman, 1999*)
- **community food system:** Interchangeable with “local” or “regional” food systems. A food system in which food production, processing, distribution, and consumption are integrated to enhance the environmental, economic, social and nutritional health of a particular place. It can refer to a relatively small area, such as a neighbourhood, or progressively larger areas, such as towns, cities, regions, bioregions, or nations. (*Cornell University, 2006*)
- **Community Food System Assessment:** Seeks to analyze in a systemic and holistic way, the nature of a local/regional/state food system, including the land requirements, production, processing, distribution, consumption, and disposal of waste. Seeks to address the interactions of food with social, environmental, and economic concerns; and should involve a full range of participants, including producers, distributors, and consumers within the community, as well as academic and applied researchers, students, and service providers. (*Freedgood, Pierce-Quironez, Meter 2011; Miewald, Barbolet, et al. 2007*)
- **Community Supported Agriculture (CSA):** Community members enter into an agreement of purchase with a farmer prior to the start of the growing season. CSA farms then offer weekly delivery or pick-up of vegetables and sometimes fruits, herbs, meat, and other products to their members. This system allows farmers and consumers to share the costs and risks of the harvest season. (*Food For All, 2011*)
- **conventional food system:** Driven by interests in profit maximization and large-scale market dominance. Provides food in chain food stores, restaurants, and fast-food establishments for city and rural residents to eat away from home. (*Caton Campbell, 2004; Pothecuchi and Kaufman 1999;*)
- **food hub:** A regional food hub is a business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail, and institutional demand. (*Regional Food Hub Resource Guide, USDA, April 2012.*)
- **food insecurity:** The inability to acquire or consume an adequate diet quality or sufficient quantity of food in socially acceptable ways, or the uncertainty that one will be able to do so (*Davis, Tarasuk, Hunger in Canada. Agriculture and Human Values 1994;11(4):50-57.*)
- **Food in Schools:** (see also **Farm-to-School**) Plays an important educational, health, and social role for children. Events and initiatives can be created around food and included in the curriculum; promotes healthy lifestyle choices, good nutrition, and benefits family household eating. (*Food For All, 2011*)
- **food security:** Exists when all people, at all times, have physical and economic access to sufficient, safe, and nutritious food to meet their dietary needs and food preferences for an active, and healthy life. (*Canada’s Action Plan on Food Security; Tarasuk, 2001*)
- **food system:** A set of interrelated functions that includes food production, processing, and distribution; food access and utilization by individuals, communities, and populations; and food recycling, composting, and disposal. (*Cornell University, 2006; Dahlberg, 1991*)
- **sustainable development:** Development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainability has been defined to embody three imperatives: environmentally sustainable, economically sustainable, and just. (*UN World Commission on Environment & Development (Brundtland Commission), 1987; Kloppenburg, Lezberg, De Master, et al., 2000*)
- **sustainable foods system:** Improves the health of the community, environment, and individuals over time, involving a collaborative effort in a particular setting to build locally-based, self-reliant food systems and economies (*Toronto Food Policy Council, 1994; Dahlberg, 1999; Peters, 2002; Feenstra, 1997*)

Appendix A

Our Community, Our Food!

What does the state of OUR food system mean to YOU?

Cornwall and Akwesasne Community Food Workshop

The *All Things Food* Regional Food System Assessment held its first Community Food Workshop on September 25th at the Cornwall Public Library in Cornwall, Ontario. The Community Food Workshops are part of the community-based segment of the Regional Food System Assessment currently being done in Stormont, Dundas, Glengarry, and Cornwall/Akwesasne. The workshop was attended by a diverse group of participants, and included interested citizens, teachers, local growers, and organizers of food-related programs, such as Community Supported Agriculture and the Green Food Box. The discussion was lively and informative, and the participants had much to say about our local food system.

Many ideas were brought up during the workshop. Everyone agreed that Cornwall and Akwesasne is a culturally and historically vibrant border community faced with many unique issues, but has promising potential to develop a strong local food system. Both communities have access to surrounding agricultural lands, have a favourable growing season, and are bordered by New York State, Quebec, and the Mohawk Nation. Though mainly urban, both communities have a lot of unused green space that can be used for growing. Many local food programs already exist, like the Green Food Box, and two community gardens which have been very successful over the years. However, there is much work to be done to create a more locally based food system in the area, such as creating demand for local food and raising awareness of the benefits of local food systems. Some key issues identified during the workshop include:

- Create stronger networks between local growers, consumers, and institutions to create a demand for local food to be used, served, and sold by local restaurants, caterers, cafeterias, grocery stores, and institutions like hospitals and schools.
- Organize a 'local food hub' or central marketplace to improve consumer accessibility and awareness in Cornwall.
- Lobby the municipal government and planning department to adopt bylaws to make urban agriculture and farming feasible within city limits; allow city property to be developed into community gardens.
- Encourage school boards to create school curriculums to teach children and youth key food skills (growing, cooking, preparing, healthy eating habits) which will in turn benefit family and community health.
- Identify and organize unused land to develop widespread community garden networks to help people grow their own produce.
- Develop stronger volunteering networks for food programs; use high school co-op terms, high school 40-hour community service volunteers, and retirees.
- Encourage a local food focus in government, school, health, youth, charity, and church communities.
- Use social media (e.g., Facebook, Twitter, and the internet) to strengthen awareness of food networks; develop a strong information network to share resources, events, and volunteers.

Our Community, Our Food!

What does the state of OUR food system mean to YOU?

Stormont County Community Food Workshop

The *All Things Food* Regional Food System Assessment held its third Community Food Workshop on October 2nd at South Nation Conservation in Finch, Ontario. The Community Food Workshops are part of the community-based segment of the Regional Food System Assessment currently being done in Stormont, Dundas, Glengarry, and Cornwall/Akwesasne.

The workshop was attended by a small group of interested participants. The discussion was lively and informative, and the participants had much to say concerning our local food system. Many ideas were brought up during the workshop. All agreed that the county of Stormont is an agriculturally vibrant county with strong community ties, a culture of home gardening, and has promising potential to develop a strong local food system. The county is made up of fertile agricultural lands, large dairy farms, has a favourable growing season, and a close proximity to Ottawa. However, there is much work to be done to create a more local food system in the area, such as creating demand and raising awareness about the benefit of a sustainable local food system. Some key issues identified during the workshop include:

- Create stronger ties between growers, food organizations, and consumers to supply restaurants, caterers, hospitals and grocery stores with local food in Stormont.
- Create a 'food hub' or central marketplace to improve access to and awareness of local food in Stormont (for example, the proposed Organic Central food hub).
- Encourage school boards to create school curriculums that teach children and youth key food skills (growing, cooking, preparing, healthy eating habits) which will in turn benefit family and community health.
- Identify and organize unused land and available community space within Stormont to develop comprehensive community garden networks to help people grow and process their own produce (for example, six community kitchens are available in North Stormont for potential use).
- Encourage a local food focus in government, health, youth, charity, and church communities; 'piggyback' local food programming onto existing agricultural programs and organizations.
- Use social media (Facebook, the internet, Twitter) to strengthen awareness of food networks and local food options; further develop the All Things Food information hub to share and identify food-related resources, events, and volunteers.



Our Community, Our Food!

What does the state of OUR food system mean to YOU?

Community Food Workshop

All Things Food Network Meeting

The *All Things Food* Regional Food System Assessment kicked off its Community Food Workshop series on September 14th at the All Things Food Network Meeting in Finch, Ontario. The Community Food Workshops are part of the community-based segment of the Regional Food System Assessment currently being done in Stormont, Dundas, Glengarry, and Cornwall.

The *All Things Food* network members took part in the workshop and represented regional public health and food security organizations, transition groups, local growers, student nutrition programs, and municipal/county economic and cultural development officers. The discussion was lively and informative, and the participants had much to say concerning our local food system.



Many issues and ideas were brought up during the workshop. Everyone agreed that SD&G, Cornwall and Akwesasne is a culturally vibrant region in Ontario is home to a wealth of agricultural resources, has a long growing season, and is in close proximity to many large urban centers. However, there is much work to be done to create a more locally-based food system in the area. Some important action items for us to work on include:

- Create stronger networks between growers, organizations, and consumers to create a widespread supply, demand, and awareness of local food.
- Develop a way to identify local food options and advertise them in SD&G, Cornwall/Akwesasne to inform and connect consumers.
- Lobby governments to develop a stronger local food focus and provide incentives for growers, businesses, and consumers to buy and sell local.
- Encourage school boards to create school curriculums that teach children and youth key food skills (growing, cooking, preparing, healthy eating habits) which will in turn benefit family and community health.
- Identify and organize unused land to develop widespread community garden networks to help people grow their own produce.
- Voice our desires for local food to be used, served, and sold by local restaurants, caterers, cafeterias, and grocery stores.
- Develop stronger connections and relationships between farmers and consumers because it is important to know where our food is coming from!
- Use social media (e.g. Facebook, Twitter, and the internet) to strengthen awareness of food networks.
- Put local food issues at the forefront of community discussions!

Appendix B

ORGANIC CENTRAL – Executive Summary

Market Opportunity

The Organic Market in Canada was counted as \$2 Billion in sales in 2008 and reached 2.5% of total retail food sales. Currently, approximately 80% of organic food retailed in Canada is imported; therefore, Canadian producers and processors have a great opportunity for import replacement. In 2009, Canada Organic Growers reported 3,914 certified organic farms in Canada, 1.7 million certified acres in production, and 1,195 certified organic processors & food handlers. The organic sector in North America reports about 20% growth per year continuously for the last 20 years, except the recent recession year. Currently, annual is estimated above 12%. Some European countries report about 8-10% organic food in the retail market. The USA has reached about 3.5% organic food in retail channels in 2009. The Canadian organic sector could quadruple the organic market in the years to come just to catch up to the world trend.

Organic Central concept

The Wal-Mart's of the world have mastered distribution channels with large volumes, economies of scale, and negotiating power. The only way to compete is to re-new the regional food systems by implementing ecology of scale: multi-purpose infrastructure, co-location and sharing, integrated supply chains over short distances, collaboration along the value chain, innovation, superior taste and quality, local supplies matched to local markets, and niche marketing.

Several factors are also converging to re-develop the local food processing infrastructure: the cost of fuel and transportation, a new interest in the local food culture and experience, a growing demand for fresh, nutritious, and organic local food, the safety risks in the concentrated industrial food system, and the capacity for independent alternative food systems to better respond to the needs of food security and sovereignty.

The plan is to create Organic Central, a hub or cluster of organic agri-food businesses in Eastern Ontario. All would improve their economies of scale and savings through synergy and collaboration, shorten their supplies lines by trading among each other, participate in the national R&D networks, provide an incubator for businesses acceleration and innovation, and exploit a shared commercial kitchen and packaging systems.

The Nature of Growing Businesses

Organic processors are largely self-made entrepreneurs that started in homes, garages, sheds, and barns. At their start of business, the simple operations required minimal infrastructure and low capital investments. But growth over the years encounters problems with zoning, access to clean water, waste disposal, hygiene, food processing standards, storage space, amenities for staff, transportation, and so on. They quickly outgrow their facility and invariably need industrial food grade space equipped with amenities for staff, water, power, storage, refrigeration, shipping & receiving, and processing space.

Homestead Organics in Berwick is a typical case. It started on the farm in 1988 but outgrew the barn and moved to the Berwick feed mill in 1997. It now processes 7,000 tonnes, moves 7 M\$ of products, and employs 13 people. Having doubled sales in the last 5 years, it needs to move and expand again to double sales in the next 5 years. In conversations with other players in the organic sector in Canada, it became clear that many other businesses are in similar situations and need a place to expand.



Organic central location and services



Organic Central considers several locations in Eastern Ontario, including a new construction in Berwick next to Homestead Organics but that option proved to be too costly. The ideal location may be in the counties of Stormont and Dundas thanks to their central location in far eastern Ontario, the proximity to large markets and transportation routes to Ottawa, Montreal, Toronto, and New York State. The preferred property would enjoy a low property cost, the availability of natural gas and electrical power, easy access to the 401 highway, and lots of

space for future growth. The plan estimates an initial requirement for an industrial building with 50,000 square feet, and ability to grow to over 100,000 square feet, on several arable acres that could host a market garden and greenhouse operation. The property needs the appropriate zoning, public water supply, public waste water management, industrial electrical service, and telecommunications infrastructures.

As the landlord, Organic Central remains responsible for property ownership, capital improvements to the property, property management, and maintenance. Organic Central will market the Center and sub-let serviced partitioned space to organic agri-food businesses, both new and existing. The Center will provide optional common services on a cost recovery basis plus profit: shipping and receiving bays, telecommunications, a conference & training center with A/V capabilities, and expert support services (mechanical, HR, IT, marketing).

Businesses considering locating at Organic Central

Several businesses are actively considering operations at Organic Central. Tom Manley and Homestead Organics (feeds, grains, farm supplies) are the promoter and anchor tenant. The Ontario Natural Food Coop, Ontario's leading distributor of natural and organic food, may be the Center's major distributor. Campus d'Alfred of the University of Guelph is working with the Guelph Food Technology Center to consider a food business incubation and training facility. Other businesses considering the location include an organic soybean roaster and crusher, a tempey producer, a flour miller, a baker, an organic vegetable processor, an organic seed production/cleaning operation, a soap maker, a producer of edible sprouts, a gluten free food processor. There is still space for many more businesses that see a future in local organic food.

Economic impact

Organic Central will start with a half dozen businesses with 30 jobs and \$10M in revenues collectively. Within 5 years, Organic Central will double the volume of operations and increase the number of businesses to reach 50 jobs and \$20M in sales. The regional economy is also impacted as these agri-food businesses flow 60-70% of their revenues to local farms. In addition, we can create 2-5 support and service jobs in the Center itself.

Timeline

The implementation of Organic Central hinges on the availability of capital, both for the individual businesses to finance their move to Organic Central and for Organic Central to access a property by purchase or by lease and to perform the required upgrades to receive the new tenants.

Homestead Organics, being the anchor tenant and promoter, continues its process to recruit a capital partner. Upon successful completing of a capital deal, the company will kick start the implementation of Organic Central.

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