Thunder Bay + Area

Food Strategy

Connecting Food and Community

THUNDER BAY + AREA FOOD + AGRICULTURE MARKET STUDY

OCTOBER 2017

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EXECUTIVE SUMMARY

The agriculture and food sector plays an important role for local, regional, and national economies. In Northern Ontario for example, the agri-food sector provides over 4,000 jobs and generates over $200 million in revenue (OMAFRA, 2016). The food sector is strongly connected to local business. If a farmer increases his/her production there are multipliers in the local economy. For example, if a farmer decides to double their production of potatoes this increases the inputs they purchase from local farm supply businesses (e.g. fertilizer, fuel supplies, seeding/harvesting/storage equipment and replacement parts, etc.) as well as any additional labour requirements. Economic developers generally try to promote the local economy and local links where possible. Capturing local economic value through local producers linked to the local economy increases jobs, supports the local tax base and supports local services. In Ontario, for every dollar spent by the farm sector a total of $2.24 circulates through the economy (Econometric Research Limited, Harry Cummings and Associates, Dr. Rod MacRae, 2015).

Despite the agri-food sector's significant contribution to the economy, there is still room for strengthening agri-food systems, including the potential for local food systems to build healthy economies while protecting the environment and supporting healthy communities. However, there is a lack of information on local food systems that could guide local businesses and economic development organizations in their local food system expansion efforts.

The Thunder Bay and Area Food Strategy was established to create a healthy, equitable, and sustainable food system in Thunder Bay and area and it supports research that aligns with these interests. With the support of 13 local agricultural associations, economic development organizations and other relevant stakeholder groups, the Food Strategy initiated the Thunder Bay and Area Food and Market Study (FAMS) in 2017 with the following objectives:

- Determine the demand of the agri-food sector and consumers for local food;
- Characterize how agri-food sectors are currently using local food (e.g. type of food, quantity, price points, purchasing habits and preferences);
- Determine challenges in obtaining local food; and
- Identify opportunities for expanding local food production and processing.

A mixed-methods approach was used for data collection consisting of key informant interviews with businesses/organizations, surveys of consumers, a focus group with producers/vendors at the Country Market; and a review of relevant secondary data.

The results of the FAMS study indicate that there is considerable interest among Thunder Bay businesses and organizations in procuring locally grown / harvested foods and it extends across the full length of the local food chain (e.g. food processing, food distribution, food retail, prepared food sector and food programs).

One of the key motivating factors for sourcing locally grown / harvested food products and/or locally processed foods is that it benefits the local economy. Another key factor that drives this interest is the belief that locally grown / harvested food products are fresher and higher quality than non-local. Many of the businesses that were engaged as part of this study reported that the use of locally grown / harvested food products added value to their operations.

However, there are also several factors that cause concern for businesses/organizations when it comes to sourcing locally grown / harvested food products. One factor is cost, specifically the observation / perception that locally grown / harvested food products are more expensive than non-local. On this matter, most businesses appreciate that a higher quality local item has more value than a lower quality, lower priced non-local item and they would be prepared to pay more for the local item. As an added qualifier though, many businesses stipulated that the local product could not be priced significantly higher than the non-local option and that the quality of the local product needs to be consistently maintained (this includes meeting food safety standards).

Another key and perhaps more significant concern that businesses/organizations have in relation to procuring locally grown / harvested foods is the uncertainty of product availability in terms of the consistency (e.g. week to week) and overall volume they require. On a related theme, there is interest in establishing a more efficient procurement / delivery mechanism for accessing locally grown / harvested foods and this includes interest in accessing semi-processed food items (e.g. sliced carrots, peeled/sliced potatoes, etc.).[1]

1 The interest in semi-processed foods is especially strong in the institution settings.

In examining the quantity of local and non-local foods being procured by Thunder Bay and area businesses/ organizations, the study determined that there are a number of food commodities where there are significant local food deficits that could potentially be addressed by local producers / processors. The following table provides an overview of some of the larger local food deficits that were identified through the study.[2]

Commodity	Annual volume / weight currently sourced from outside the Thunder Bay area *	Commodity	Annual volume / weight currently sourced from outside the Thunder Bay area *
Potatoes	over 530 tonnes	Ground beef	over 5 tonnes
Carrots	over 175 tonnes	Roast beef cuts	over 18 tonnes
Tomatoes	over 110 tonnes	Pork loin	over 12 tonnes
Dry onions	over 8 tonnes	Pork shoulder	over 10 tonnes
Cabbage	over 72 tonnes (80,000 heads)	Pork sausage	over 23 tonnes
Romaine lettuce	over 9 tonnes (15,000 heads)	Bacon	over 11 tonnes
Sweet corn	over 32,000 cobs	Chicken breast	over 36 tonnes
Apples	over 6 tonnes	Eggs, whole shell	over 40,000 dozen
Strawberries	over 4 tonnes	Butter	over 6 tonnes
Blueberries	over 3 tonnes	Cheese, mozzarella	over 17 tonnes
Canola oil	over 13 kilolitres	Cheese, blended	over 17 tonnes
Vegetable oil	over 12 kilolitres	Flour, all purpose	over 89 tonnes
		Flour, fine sifted	over 5 tonnes

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

It is important to emphasize that the figures presented in the above table do not represent the total local food deficit for the Thunder Bay area (i.e. the difference between total local food production and total local consumption). An analysis of select food items reveals that there are substantial food deficits that represent important growth opportunities for agriculture in the Thunder Bay area (e.g. local food deficit for potatoes = 3,400 tonnes; tomatoes = 3,000 tonnes; carrots = 800 tonnes; dry onions = 770 tonnes).

From the consumer perspective, we note that some of the interests/values of local consumers mirror those of the local businesses/organizations. For example, while food quality and in season freshness were identified by customers as important motivators for buying local, the leading stimulus that customers identified is that it benefits the local economy.

The majority of Country Market and grocery store customers that participated in this study reported that buying locally produced food items (produced within 100km of Thunder Bay) is important to them. The majority of customers also indicated that they are willing to pay more for high quality locally grown / harvested foods relative to non-local foods but it was stressed by some customers within this group that the prices for locally produced food items should not be priced substantially higher than comparable non-local items.

While food pricing was identified by some customers as a key factor that can limit their access to local foods, a more commonly identified factor is that locally produced foods are not broadly available in locations outside the Country Market (e.g. grocery stores, supermarket stores, convenience stores, etc.). Consumers are interested in seeing a greater presence of local foods in different food retail outlets and even the application of innovative approaches to food retail (e.g. pop-up markets, mobile markets).

Within the Country Market setting itself, customers identified a number of ways that the shopping experience could be improved including expanding the selection and amount of fresh local food available, improving physical accessibility within the building, and providing more information (e.g. farm management practices, where venders sell their product outside the market, educational workshops - cooking lessons, recipes, etc.).

The following recommendations are informed by the results of the FAMS study and focus on activities that will contribute to further advancing the development and expansion of the local food economy.

1. Share the results of the FAMS study with producers to raise awareness about the market demand

2 It is important to note that the figures presented in the table are derived from a small sample of businesses/organizations (103) across the local food chain and not all of them were able to provide data. As such, these figures represent only a partial picture of the total volume/weight of food items sourced from outside the Thunder Bay area.

opportunities that exist and provide guidance on how this information can be factored into their business planning.

2. Coordinate an annual Local Food/Drink Procurement Forum to bring local food producers and buyers together to share information on current/emerging food production activities and procurement needs, build relationships, stimulate ideas and form strategies for fostering more efficient and effective collaboration, and share best practice solutions.[3] The forum should include representatives from the agriculture sector, food retail sector, food distributors, food processors, the prepared food sector, food programs, economic development officials with the City of Thunder Bay, and financial institutions. Possible activities to feature at the forum include key note speakers, panel discussions, and interactive breakout discussion groups focusing on a variety of topics such as:
    - identifying/confirming local food system assets and opportunities for investment and local capacity building
    - sharing success stories on the movement of locally grown/harvested food products through local food distributors, retailers, restaurants and institutions
    - brainstorming actions / strategies for getting more locally grown/harvested food into retail outlets, restaurants and institutions
    - creating a multi-year action plan with short-term and long-term goals

3. Explore the feasibility of a local food hub / food innovation centre to provide a centralized location for local food distribution / food procurement activities and information sharing.[4] The multipurpose centre could feature the following elements:
    - a warehouse storage area including industrial size cooler and freezer rooms
    - designated areas for receiving fresh food deliveries and shipping fresh and processed foods
    - a vegetable/fruit processing area with licensing from the appropriate authorities (e.g. rooms equipped with cleaning / slicing / dicing / bagging equipment)
    - a commercial test kitchen for product development
    - a public meeting room for hosting information and demonstration events (e.g. information sessions hosted by producers on the upcoming growing season and production plans and product availability; information sessions / cooking demonstrations hosted by chefs on preserves and extending the availability of local food products throughout the year; information sessions hosted by distributors on food supplier certification / audit criteria and specifications)
    - other organizations in the community could be exploring/advancing plans that are related to some of the features noted above and these should be identified / examined as part of the food hub planning process to determine areas of potential collaboration

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3 Examples of local/regional food forum and stakeholder networking events:
- TORC Forum 2007: Capturing Local Food Opportunities.
    - http://www.ruralontarioinstitute.ca/file.aspx?id=93ac425b-34e9-4025-b327-22b8d8d93415
- Source it Here – Local Food Networking Event – Guelph Wellington Local Food
    - http://www.tastereal.com/events-2/source-it-here-b2b-networking/
    - http://www.tastereal.com/wp-content/uploads/2014/10/Source-It-Here-2016-Media-Release.pdf
- Cultivating Connections – Alberta Regional Food Systems Forum
    - https://cultivatingconnections2017.splashthat.com/
    - https://drive.google.com/file/d/0B0dgbN7UlrtzdS1oa0NpU2Q1a1k/view

4 Examples of full service food hubs with activities related to production, aggregation, processing, and distribution of local food:
- Ottawa Food Hub / Eastern Ontario Food Hub Constellation:
    - http://nourishingontario.ca/wp-content/uploads/2015/11/EO-Food-Hub-Constellation-FINAL.pdf
    - http://ottawakitchen.ca/
- Two Rivers Food Hub – Eastern Ontario: https://tworiversfoodhub.com/
- Washtenaw Food Hub – Michigan: http://washtenawfoodhub.com/
- Quad Cities Food Hub – Iowa and Illinois: http://www.qcfoodhub.org/

Examples of food hub feasibility studies:
- Winnipeg, MB: http://www.foodmattersmanitoba.ca/wp-content/uploads/2014/06/WFH-Feasibility-Final-Report-mar-2014-photos.pdf
- Township of Langley, BC: https://www.tol.ca/your-township/plans-reports-and-strategies/food-hub-feasibility-study/
- Northwest Michigan: http://foodsystems.msu.edu/uploads/files/Feasibility_Report_for_a_Food_Hub.pdf
- Galesburg, Illinois: http://foodsystems.msu.edu/uploads/files/Galesburg_Feasibility_Study.pdf

Other resources / case studies of food hub related initiatives:
- http://nourishingontario.ca/ontario-food-hub-case-studies-2015/northern-ontario-case-studies-2015/
- http://foodsystems.msu.edu/resources/report/2015%20National%20Food%20Hub%20Survey%20Findings.pdf

4. Partner / work with grocery stores to identify and implement strategies to promote / market Thunder Bay products (e.g. improved signage, dedicated space). Partner / work with relevant advocacy groups/ organizations (I Choose TB, Ontario Culinary Tourism Alliance) to promote / market Thunder Bay products.

5. Support the Country Market in working with the CLE to advance short-term enhancements for improving accessibility to and within the building. Identify longer-term options for making the existing building fully accessible and/or options for relocating to another facility that is fully accessible.

   - Support the promotion and development of farmers' markets in the surrounding area.[5] Support can take the form of a variety of activities including logistic support and services (e.g. marketing and promotion, site management/maintenance) and acknowledging in planning/policy documents (e.g. official community plans, regional growth strategies, agriculture area plans, food strategies, etc.) to better enable relevant government departments to take action.

6. Identify and test approaches for establishing additional sites for the sale of local food (e.g. pop up markets, mobile food markets).[6]

5 Examples of markets in the surrounding area include Kakabeka Farmers' Market, Nolalu Market, Willow Springs Market (Lappe), Green Acres Market (Township of South Gillies).

6 Examples of mobile food markets that focus on sourcing food items that are locally grown:
- Wendy's Mobile Market – Rideau Lakes Township, ON
  - http://nourishingontario.ca/wendys-country-market/
  - http://www.wendyscountrymarket.com/delivery-service.html
- Real Food Farm Mobile Farmers Market – Baltimore, MD
  - https://civicworks.com/programs/real-food-farm/
  - https://baltimoreurbanagriculture.wordpress.com/real-food-farm-brings-produce-to-the-people/
- Mobile Oasis Farmers Market - Guilford County, NC
  - https://guilfordmobileoasis.com/news-updates-2
- Flint Fresh Mobile Market – Flint, MI
  - https://www.flintfresh.com/pages/mobile-market
  - https://www.citylab.com/life/2016/07/a-mobile-market-will-boost-access-to-healthy-food-in-flint/491846/

TABLE OF CONTENTS

Executive Summary....3
Acknowledgements....8
1.0 Introduction & Background....11
2.0 Methodology & Research Design....13
2.1 Primary Data Collection....13
2.1.1. Key Informant Interviews....14
2.1.2 Survey of Country Market Customers....15
2.1.3 Survey of Grocery Store Customers....16
2.1.4 Focus Group Discussion with Country Market Vendors....16
2.2 Secondary Data Collection....17
2.3 Research Limitations....17
3.0 Findings / Results....19
3.1 Profile of Food Demand for Local Businesses / Organizations....19
3.1.1 Prepared Food Sector....19
3.1.2 Food Processors....31
3.1.3 Food Distributors....39
3.1.4 Food Retailers....43
3.1.5 Food Programs....47
3.1.6 Summary of Food Demand - Local Businesses / Organizations....49
3.2 Profile of Local Food Consumer Habits / Preferences / Values....49
3.2.1 Country Market Customers....49
3.2.2 Grocery Store Customers....54
3.2.3 Country Market Vendors....57
3.2.4 Summary of Consumer Values / Interests in Relation to Local Food....59
3.3 Farm Production Characteristics for the Thunder Bay Area....60
3.3.1 Livestock, Poultry, Honeybees....64
3.3.2 Major Field Crops....65
3.3.3 Major Field Vegetable Crops....65
3.3.4 Greenhouse Crops....66
3.3.5 Major Fruit and Berry Crops....66
3.3.6 Summary of Local Farm Production Activity....67
4.0 Conclusions and Recommendations....71
References....74
Appendices....75
Appendix A: Key Informant Interview Guide for Food Sector Businesses / Organizations....77
Appendix B: Country Market Customer Survey....87
Appendix C: Grocery Store Customer Survey....91
Appendix D: Data Tables for the Country Market Customer Survey....95
Appendix E: Data Tables for the Grocery Store Customer Survey....103

ACKNOWLEDGEMENTS

FAMS PARTNERSHIP AND ADVISORY COMMITTEE

We gratefully acknowledge the following organizations for their support and guidance in completing the Thunder Bay and Area Food and Agriculture Market Study.

- City of Thunder Bay
- EcoSuperior Environmental Programs
- EarthCare Thunder Bay
- North Superior Workforce Planning Board & Local Employment Planning Council
- Northwestern Ontario Innovation Centre
- Northern Policy Institute
- Thunder Bay Country Market
- Thunder Bay Chamber of Commerce
- Thunder Bay Community Economic Development Commission
- Thunder Bay Ventures
- Thunder Bay District Health Unit
- Thunder Bay Federation of Agriculture
- Regional Food Distribution Association

The Food Strategy Coordinator, Amy Bumbacco, also played a valuable role in supporting and guiding the research process and promoting the study to the broader community.

PARTICIPANTS

We gratefully acknowledge all of the businesses and organizations for their time in offering information and insights about their operations and the local food scene in Thunder Bay. We thank the Thunder Bay Country Market for allowing us to conduct a consumer survey on site at the market in June and July as well a vendor focus group discussion in July. We also thank the following grocery stores for allowing us to conduct consumer surveys at their premises in June and July: Metro (River Street), Metro (Arthur Street), and Scaf's Just Basics. Additionally, we thank all of the residents that participated in the consumer surveys.

RESEARCH TEAM

We gratefully acknowledge the support we received from our research associates in Thunder Bay. The local team represented an important resource in completing the data collection. Raili Roy and Saara Rizzo were especially crucial in providing leadership and a strong commitment to secure the participation of as many stakeholders as possible over the course of the study.

Don Murray

Harry Cummings

Harry Cummings and Associates, October 2017

This project was funded in part through local financial contributions from the following organizations and businesses:

- Beef Farmers of Ontario
- Eat Local Pizza
- EcoSuperior Environmental Programs
- Northwestern Ontario Innovation Centre
- Thunder Bay Chamber of Commerce
- Thunder Bay Community Economic Development Commission
- Thunder Bay Country Market
- Thunder Bay Federation of Agriculture
- Thunder Bay Soil and Crop Improvement Association
- Thunder Bay Ventures

This project was funded in part through *Growing Forward 2 (GF2*), a federal-provincial-territorial initiative.
The Agricultural Adaptation Council assists in the delivery of *GF2* in Ontario.

1.0

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1.0 INTRODUCTION & BACKGROUND

The agriculture and food sector plays an important role for local, regional, and national economies (Harry Cummings and Associates, 2009; JRG Consulting Group, 2013; Econometric Research Limited, 2015). In Northern Ontario for example, the agri-food sector provides over 4,000 jobs in the region, generates over $200 million in revenue, and supports the growth of local and regional food systems (OMAFRA, 2016). According to the 2017 report of the Advisory Council on Economic Growth, the agri-food sector continues to be a major driving force in Canada's economy (Government of Canada, 2017).

Despite the agri-food sector's significant contribution to the economy, there is still room for growth. A recent report outlined areas for strengthening agri-food systems, including the potential for local food systems to build healthy economies while protecting the environment and supporting healthy communities (Econometric Research Limited, Harry Cummings and Associates, & MacRae, 2015). Furthermore, the Ontario Government estimates that if every household in Ontario shifted a mere $10 each week to Ontario-grown and -raised food items, the financial impact for businesses would result in $2.4 billion in additional sales revenue and create 10,000 new jobs in food service, processing and agriculture (Government of Ontario, 2012). However, there is a lack of information on local food systems that could guide local businesses and economic development organizations in their local food system expansion efforts.

Local food systems are affected by supply and demand factors. Their size and growth depends on the combined demand from businesses and consumers for local food, and the agri-food sector's ability to supply these groups with local food. In some areas, growing consumer demand for local food has led to an increase in the number of local products offered across the food supply chain (The Conference Board of Canada, 2013). Challenges exist, however, for sectors that require large volumes of food product to remain viable. Going further, price, availability, and other factors may prevent consumers from purchasing local food. There is a need to better understand the demand and supply for local food, along with the general food context, as to ensure for a sustainable food system.

Demonstrating commitment to sustainable food systems, many municipalities across Ontario have developed food strategies. The Thunder Bay and Area Food Strategy, supported by the Ontario Trillium Foundation, was established to create a healthy, equitable, and sustainable food system in Thunder Bay and Area.[7] As part of the Food Strategy, the Thunder Bay and Area Food and Market Study (FAMS) was initiated in 2017. The FAMS project builds on previous studies on agriculture and the agri-food system in Thunder Bay and area as initiated by the Thunder Bay and Area Food Strategy.[8]

With support of 13 local agricultural associations, economic development organizations and other relevant stakeholder groups, the FAMS project aims to better understand the demand for local food.[9] Specifically, the objectives of FAMS are to:

- Determine the demand of the agri-food sector and consumers for local food;
- Characterize how agri-food sectors are currently using local food (e.g. type of food, quantity, price points, purchasing habits and preferences);
- Determine challenges in obtaining local food; and
- Identify opportunities for expanding local food production and processing.

This report presents the findings for the FAMS project. The information gathered provides an overview of short-term and medium-term opportunities for supplying the local market. Furthermore, the research findings will help inform the development of local food policies and expansion efforts In Thunder Bay and area and other municipalities.

7 The Food Strategy was funded by the Ontario Trillium Foundation in 2013 and aims to create a healthy, equitable, and sustainable food system that contributes to the economic, ecological, and social well-being and health of the City of Thunder Bay and Area. EcoSuperior partnered with the City of Thunder Bay and Thunder Bay District Health Unit to secure this funding, and the Food Strategy is endorsed by the seven area municipalities: Oliver Paipoonge, Neebing, Gilles, Conmee, O'Connor, Shuniah and Dorion.

8 For example, the Workforce Multiplier Effect of Local Farms and Food Processors in Northwestern Ontario (2013).

9 Stakeholders in the Partnership include: EcoSuperior Environmental Programs, EarthCare Thunder Bay, North Superior Workforce Planning Board & Local Employment Planning Council, Northwestern Ontario Innovation Centre, Northern Policy Institute, Thunder Bay Country Market, Thunder Bay Chamber of Commerce, Thunder Bay Community Economic Development Commission, Thunder Bay Ventures, Thunder Bay Federation of Agriculture, and the Regional Food Distribution Association. The City of Thunder Bay, the Thunder Bay District Health Unit, and the Ontario Ministry of Agriculture, Food and Rural Affairs were advisory members to this group.


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2.0 METHODOLOGY & RESEARCH DESIGN

The study area includes the City of Thunder Bay and surrounding municipalities and townships (Oliver Paipoonge, Neebing, Gillies, Commee, O'Conner, Shuniah and Dorion). There is no standard definition of local food, however, the most commonly used approach defines local food according to the distance that the food travels from production to consumption. For the purpose of this study we defined local food as food that is grown / harvested, processed, sold, and consumed within 100 km of Thunder Bay.

A mixed-methods approach was used for data collection consisting of:

- Key informant interviews with businesses/organizations representing food processors and distributors, food retailers, food programs, and the prepared food sector.
- Surveys of consumers at the Thunder Bay Country Market and a selection of local grocery stores
- A focus group with producer/vendors at the Thunder Bay Country Market
- A review of relevant secondary data

Additional details on these methods and the key research questions that were addressed are provided in sections 2.1 and 2.2.

The FAMS study was guided and supported by the Thunder Bay and Area Food Strategy Coordinator (employed by EcoSuperior) and the Partnership and Advisory Committee. The Food Strategy Coordinator coordinated Partnership meetings as needed, shared project information with all collaboration members, liaised with the Partnership and the lead research consultant (Harry Cummings and Associates – HCA), engaged with representatives from the different stakeholder groups, and promoted the study in the community.

The Partnership and Advisory Committee played a key role in the research process by:

- Contributing to the development of the research approach and data collection tools
- Identifying and confirming the relevant businesses / organizations to be invited to participate in the study
- Engaging directly with businesses / organizations to encourage their participation as needed
- Securing access to relevant secondary data (e.g. Canadian Community Household Survey, Census of Agriculture)
- Participating in monthly meetings to review and guide the research progress
- Reviewing and providing feedback on the draft final report

HCA developed the research workplan in collaboration with the Partnership and carried out all of the data collection, analysis and report writing. A small team of research associates based in Thunder Bay was identified and recruited by HCA to assist with the data collection.

2.1 PRIMARY DATA COLLECTION

Primary data (i.e. information collected directly from stakeholders) was obtained through the following methods:

- Key informant interviews with businesses/organizations representing food processors and distributors, food retailers, food programs, and the prepared food sector
- Surveys of consumers at the Thunder Bay Country Market and a selection of local grocery stores
- A focus group with producers/vendors at the Thunder Bay Country Market

2.1.1. KEY INFORMANT INTERVIEWS

The Partnership took a lead role in preparing the list of relevant local businesses and organizations to be invited to participate in key informant interviews. A total of 163 businesses were identified that purposely reflect a cross section of small, medium and large-scale businesses / organizations. The list consisted of:

- 43 food processors: businesses that buy wholesale, add value, and sell to a retailer or intermediary
- 85 prepared food sector businesses / organizations: operations that buy food wholesale and prepare food for end user consumption (e.g. restaurants, caterers, public sector institutions)
- 7 food programs: organizations that buy food to increase access to healthy foods (e.g. Good Food Box Program, Student Nutrition Programs, and Farm to Cafeteria)
- 22 food retail sector businesses: operations that buy food wholesale and sell to the end consumer, such as grocery stores
- 6 food distributors: businesses that sell food in bulk quantities at wholesale prices to grocery stores, the prepared food sector and other food service operations.

The key informant interview guide was developed by HCA in consultation with the Partnership and went through several modifications to ensure that the tool and the approach would produce the desired information. The key informant interview tool is presented in Appendix A. The questionnaire addresses the following key questions:

- What types of food items are local food processors, food distributors, food retailers, food programs and businesses/organizations in the prepared food sector sourcing/using and in what quantity/volume?
- Approximately what proportion of the total quantity/volume being sourced is locally grown / harvested within 100km of Thunder Bay?
- How price-sensitive are businesses / organizations on the food items they source / use?
- What delivery conditions / specifications need to be met with respect to how food items arrive at their door (e.g. value-added processing, minimum food standard)?
- Are businesses / organizations interested in sourcing / using more locally grown / harvested foods than they currently do?
- What factors motivate businesses / organizations to source locally grown / harvested foods?
- What factors dissuade businesses / organizations from sourcing locally grown / harvested foods?
- Do businesses / organizations feel that using locally grown / harvested foods adds value to their business?

The key informant interviews were conducted between June, July and August. The majority of the interviews were conducted by phone and a small number were conducted on site at the request of the business / organization. First engagement with each businesses / organization was by phone using the contact information provided by the Partnership. In some cases, email communication was used to support phone communication if this information was available to the interview team. The interview team made multiple attempts to reach and engage with the designated contact person at each business / organization. As the research progressed, the interview team enlisted the assistance of the Partnership to try and reach out to some of the businesses / organizations that were difficult to engage (e.g. contact person was not available, contact person did not respond to voice messages or emails).

A total of 103 businesses / organizations ultimately participated in interviews while 24 declined to participate and 36 could not be reached. The following table provides a breakdown of participation by the different business / organization sectors.

Table 1: Business / Organization Participation in Key Informant Interviews

Business / organization sector	Completed the interview	Unable to reach / engage	Declined to participate	Total
Food processors	28	7	8	43
Prepared food sector	52	25	8	85
Food programs	5	0	2	7
Food retail sector	13	4	5	22
Food distributors	5	0	1	6
Total	**103**	**36**	**24**	**163**
	63%	**22%**	**15%**	**100%**

All data collected through the key informant interviews was compiled in an electronic data base (Excel). The data was cleaned and structured (e.g. equivalent food quantity / volume measures were applied across all businesses / organizations). Frequency tables were prepared for each food item. Content analysis was used to identify key themes in the qualitative data.

2.1.2 SURVEY OF COUNTRY MARKET CUSTOMERS

The Country Market survey tool was developed by HCA, reviewed by the Partnership and finalized by HCA based on the feedback provided by the Partnership. The Country Market survey tool is presented in Appendix B. The survey addresses the following key questions:

- What are the most important factors that customers consider when buying food (e.g. quality, nutritional value, availability of local products, price, etc.)?
- What are the most important factors that motivate/interest customers when buying locally grown / harvested food?
- How much are customers spending at the Country Market (most recent visit)?
- How do customers feel about the price of locally grown / harvested foods?
- What are customer views on the attributes of the Country Market (e.g. areas of strength, areas for improvement)?

Two versions of the Country Market survey were developed and deployed. The first version of the survey was deployed by a survey team on site at the Country Market and targeted a sample of 100 market customers over several market days (Wednesdays and Saturdays) between June 17 and July 5.[10] Market customers were selected as they were leaving the market which allowed them to speak to their shopping habits that day.

The second version of the Country Market survey was deployed through the Internet via the Food Strategy website (June 22 to July 11) and the Country Market Facebook page (June 28 to July 15). The Internet surveys were open to the general public and no sample target was used. The surveys where closed when it was determined that responses had discontinued.

All data collected through the onsite and online surveys was compiled in an electronic data base (Excel). The data was cleaned (e.g. data was coded/recoded where needed, online surveys that were minimally completed were removed from the data base). Frequency tables and cross tabulations were prepared for all of the quantitative data and inferential statistics were used to identify any significant differences between subgroups in the survey population.[11] Content analysis was used to identify key themes in the qualitative data.

A total of 385 Country Market customers participated in the onsite and online surveys:

- 100 customers participated in the onsite survey at the Country Market
- 154 customers participated in the online survey through the Country Market facebook page
- 131 customers participated in the online survey through the Food Strategy website

Note: the Country Market was a special area of focus in this study as it represents a key access point for local food.

10 The survey days at the Country Market included June 17, June 28, July 1, and July 5 - 2017.

11 The SPSS statistical software package was used for analysing the quantitative data.

2.1.3 SURVEY OF GROCERY STORE CUSTOMERS

The grocery store survey tool was developed by HCA, reviewed by the Partnership and finalized by HCA based on the feedback provided by the Partnership. The grocery store survey tool is presented in Appendix C. The content in the grocery store survey largely mirrors the content in the Country Market survey and allows for direct comparison of the findings. The grocery survey addresses the following key questions:

- What are the most important factors that customers consider when buying food (e.g. quality, nutritional value, availability of local products, price, etc.)?
- What are the most important factors that motivate/interest customers when buying locally grown / harvested food?
- What are the key reasons for customers not buying locally grown / harvested food?
- How much are customers spending at the grocery store (most recent visit)?
- How do customers feel about the price of locally grown / harvested foods?

Two versions of the grocery store were developed and deployed. The first version of the survey was deployed by a survey team on site at several grocery stores and targeted a sample of 100 store customers over several days between June 24 and July 21.[12] Store customers were selected as they were leaving the store which allowed them to speak to their shopping habits that day.

The second version of the grocery store survey was deployed through the Internet via the Food Strategy website (June 27 to July 20). The Internet survey was open to the general public and no sample target was used. The survey was closed when it was determined that responses had discontinued.

All data collected through the onsite and online surveys was compiled in an electronic data base (Excel). The data was cleaned (e.g. data was coded/recoded where needed, online surveys that were minimally completed were removed from the data base). Frequency tables and cross tabulations were prepared for all of the quantitative data and inferential statistics were used to identify any significant differences between subgroups in the survey population. Content analysis was used to identify key themes in the qualitative data.

- A total of 178 grocery store customers participated in the onsite and online surveys:
- 100 customers participated in the onsite survey at the grocery stores
- 78 customers participated in the online survey through the Food Strategy website

2.1.4 FOCUS GROUP DISCUSSION WITH COUNTRY MARKET VENDORS

A focus group discussion with farmer vendors was conducted to gain a deeper understanding of consumer motivations and preferences in relation to their local food purchasing habits from the perspective of local producers (market vendors). The discussion session was also used to identify emerging consumer trends and collect observations on the capacity of the Country Market to grow / improve. A small number of discussion topics/questions were purposely selected knowing that many of the vendors would have other commitments later in the day and would not be able to commit to a lengthy discussion.

The focus group was organized and coordinated with the assistance of the Country Market Manager who provided invitation letters to farmer vendors and promoted the discussion session several weeks in advance of the event.

The focus group discussion was conducted on July 22, 2017 at the Country Market, approximately 30 minutes after the close of the Saturday market. A total of 10 vendors participated in the discussion which lasted for approximately 90 minutes.

The 10 participants represent a wide range of products including fresh produce, meat products, dairy products,

12 The store locations included Metro (River St.), June 24; Scaf's Just Basics, July 15; and Metro (Arthur St.), July 21 - 2017.

eggs, and baked goods. Most of the vendors have been attending the market for multiple years. One new vendor started attending the market this year.

The discussion was facilitated by Don Murray (HCA) with support from Saara Rizzo. The information captured through the discussion was analyzed to identify key themes and patterns. The focus group findings were also compared against findings from the Country Market customer survey where relevant.

2.2 SECONDARY DATA COLLECTION

Secondary data (i.e. data collected in the past and from other parties) was obtained through the following methods:

- A review of relevant data from the Canadian Consumer Health Survey, Statistics Canada (CCHS)
- A review of relevant data from the Census of Agriculture, Statistics Canada

Secondary data from the CCHS was used to gain a high-level picture of fruit and vegetable consumption for the Thunder Bay District Health Unit catchment area. The secondary data from the Census of Agriculture was used to gain a picture of agricultural production activity in Thunder Bay District including changes over the three most recent census periods (2006, 2011, 2016).

2.3 RESEARCH LIMITATIONS

It is important to note that the selection of businesses / organizations for key informant interviews was purposeful. The sample is intended to reflect a cross section of small, medium and large-scale businesses / organizations representing the breadth of the local food chain (food processors, prepared food sector businesses / organizations, food programs, food retail sector businesses, food distributors). The aggregate values that were derived from these interviews are intended to illustrate a portion of the existing demand for local food and the growth potential for local food.

From a methodological standpoint, the most challenging aspect of the research was connecting with businesses / organizations and engaging their cooperation to complete the interview. Many of the businesses / organizations expressed a strong interest in the research and followed through with an interview. However, some business / organization representatives were not able to commit to a lengthy interview / engagement and focussed on a short list of food items. In a few other cases, the representatives declined or were not able to provide any quantitative data related to their operations. We experimented with a web based survey to accompany the interview with the thinking that this option would be more convenient for businesses / organizations but this approach produced a very low response rate and was discontinued.

We also allowed for some on-site interviews to be conducted where this was the expressed preference of the business / organization but even with this approach there were instances where the representatives cancelled the interviews or was not present at the pre-determined time/place.

As the research progressed, the interview team enlisted the assistance of the Partnership to try and reach out to some of the businesses / organizations that were difficult to engage (e.g. contact person was not available, contact person did not respond to voice messages or emails) to try and encourage their participation and this was successful to some extent.


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3.0 FINDINGS / RESULTS

This section of the report presents the findings and analysis of the data collection that was carried out over the period of the FAMS study. It also reviews and incorporates an analysis of relevant secondary data.

3.1 PROFILE OF FOOD DEMAND FOR LOCAL BUSINESSES / ORGANIZATIONS

The following six sections provide the results from the key informant interviews with businesses and organizations representing food processors and distributors, food retailers, food programs, and the prepared food sector.

Included in the findings is an analysis of:

- the motivation for using and/or not using locally grown/harvested products
- the quantity of food products being used by food type (e.g. vegetables, fruit, proteins, dairy, grains, etc.) and the locally grown/harvested component
- the product delivery requirements/preferences (e.g. fresh, processed, frozen)
- price considerations in sourcing locally grown/harvested products
- interest in expanding the use locally grown/harvested products

It is important to note that the businesses and organizations interviewed typically provided information on the food items that they use in substantial quantities and identify as important. The data does not reflect a total inventory of food procurement / use by the businesses and organizations. Furthermore, some businesses / organizations were not able to (or chose not to) provide details on the quantities of the food items they procure / use.

3.1.1 PREPARED FOOD SECTOR

INTRODUCTION

The prepared food sector was the largest group involved in the Thunder Bay and Area Food and Market Study. The majority of businesses in this sector are restaurants serving eat in or take out customers on a daily basis. Each establishment is unique and ranged from an establishment with a service counter and a few tables operated by the owner and his/her family to a larger upscale restaurant serving the dinner crowd. Only two of the businesses were affiliated with provincial/national chain restaurants or chain supported fast food as these operations tend to focus on franchise food brands. In general, the restaurants have a wide variety of needs that could possibly be served by local suppliers. This ranges from the meat, potatoes and vegetables associated with a meal to herbs and greens designed to enhance the variety, taste, quality and nutrition of the meal. The interviews revealed many unique menu items requiring small amounts of local product on a weekly or twice weekly basis.

We also interviewed a small number of institution based operations that prepare/provide daily meal options for large numbers of students, patients, etc. The volume of food required by these organizations over the course of a year is significant and there is strong interest among these organizations in sourcing/utilizing more locally grown/ harvested food items.

A total of 52 businesses / organizations were interviewed from the prepared food sector. The majority of these operations (42) are businesses from the restaurant / catering sector and the balance (10) are institution based operations (education, health, government sector).

The businesses in the restaurant / catering sector represent a broad cross section of newer and older establishments. Approximately half of the businesses have been in operation for five years or less while several businesses have been in operation for more than 20 years. Many of the businesses employ 10 or more individuals and collectively the businesses have over 450 employees (full-time, part-time and seasonal combined).

Many of the institution based operations have been in operation for more than 30 years. They typically employ 30 or more people and one institution is a major employer in the City of Thunder Bay.

Almost all of the businesses (39 of 42) and many of the institutions (7 of 10) reported that they currently buy some amount of food grown / harvested within 100km of Thunder Bay (or food products made with ingredients grown within 100km of Thunder Bay).

Approximately half of the businesses/organizations reported that a key motivation for buying locally grown/ harvested food items is that it benefits the local economy (54%). Other key motivators for buying local include the belief that locally grown/harvested food items are higher quality (35%) and fresher (24%) than non-local food items (Table 2).

Table 2: Motivation of businesses / organizations for buying local (n=46)

Motivation for buying local	Number	Percent
Contributes to the local economy	25	54.3%
Local is higher quality	16	34.8%
Local is fresher	11	23.9%
Important to have a relationship with farmers	6	13.0%
Promotes environmental health	5	10.9%
Using local foods as a marketing tool	4	8.7%
Customers interested / demand local food	3	6.5%
Local foods are cost comparable to non-local	3	6.5%
Local foods are convenient to access	2	4.3%

Respondents were allowed to identify more than one motivator.

With respect to the factors that dissuade businesses/organizations from buying locally grown/harvested food items, the most common concerns identified include cost, consistency in availability and/or seasonality, consistency in food standards, and delivery / access challenges (Table 3).

Table 3: Motivation of businesses / organizations for not buying local (n=31)

Motivation for not buying local	Number	Percent
High cost concerns	16	51.6%
Consistency in availability and/or seasonality concerns	12	38.7%
Consistency in food standards / quality concerns	7	22.6%
Delivery / accessibility challenges	7	22.6%
Insufficient volume of product	6	19.4%
Farmers are not producing the food items they want	5	16.1%
Decisions limited by headquarters / franchise policies	3	9.7%
Raw products need to be processed further	1	3.2%
Unfamiliar with supplier locations	1	3.2%

Respondents were allowed to identify more than one factor.

Respondents were asked if they would consider purchasing a local product of higher quality at a higher cost than a non-local product of lesser quality. Of the 41 businesses/organizations that responded to this question, 56% indicated that they would and a further 22% reported that they would with some qualifications (mainly that local items cannot be priced significantly higher than non-local food items and that local producers need to consistently deliver high quality food items). Approximately 22% reported that they were not interested in purchasing local products of higher quality at higher costs and cited doubts that local producers could compete with non-local food items on price and that local producers could not provide high quality food items on a consistent basis.

Businesses/organizations were asked to identify the key characteristics they think of when looking for 'higher quality' food items. The most common features identified include freshness and flavourful and/or appealing appearance (Table 4).

Table 4: Attributes that businesses / organizations associate with 'higher quality' food (n=36)

Attributes	Number	Percent
Freshness	18	50.0%
Flavourful and/or appealing appearance	14	38.9%
Chemical free / no additives	6	16.7%
Consistent quality / standard	6	16.7%
Highest quality / standard	4	11.1%
Locally grown	3	8.3%
Consistent availability	2	5.6%
Unique food product	2	5.6%
Raised ethically	1	2.8%
Minimal processing	1	2.8%
Good baking / cooking performance	1	2.8%

Respondents were allowed to identify more than one motivator.

Approximately, 67% of the businesses/organizations that reported using locally grown/harvested food items believe that local foods add value to their operation. A further 18% reported that they don't feel the use of local food items adds value to their operation and 15% are unsure.

Businesses/organizations were asked to share their views on what would make it easier for them to purchase local food. The most common factor identified is to offer local foods at a price that is reasonably comparable to prices being offered through distributors (46%). A substantial proportion of businesses (36%) also suggested the need for improving local food access / delivery mechanisms in Thunder Bay to make it more convenient. An important priority for businesses/organizations is to have access to consistent volumes of food items throughout the year (34%). In some instances, it is crucial for suppliers to provide assurances that they meet certain food standards (e.g. audit / certification process) (Table 5).

Table 5: What would make it easier for your business/organization to purchase local food? (n=44)

Factors	Number	Percent
Reasonably / competitively priced foods	20	45.5%
Improved delivery / access mechanism (e.g. direct delivery, centralized location)	16	36.4%
Consistency of food volume / availability	15	34.1%
Maintaining supply out of season	5	11.4%
Consistency of food quality / standards	5	11.4%
Assurance of food standards and quantity (e.g. audit process)	4	9.1%
Expand volume / variety of local food at grocery stores	2	4.5%
Reduce the amount of wasteful packing to align with internal philosophy / policies	1	2.3%
Must be chemical free	1	2.3%
Processing before delivery (e.g. washing, dicing)	1	2.3%

Respondents were allowed to identify more than one factor.

CURRENT PROCUREMENT OF LOCAL / NON-LOCAL FOOD ITEMS

Businesses/organizations were invited to share details on the amounts of food items they procure/source for their operations on an annual basis. They were advised to consider items that they use in considerable quantities and that could potentially be grown / harvested in the Thunder Bay area. They were also asked to distinguish between the amounts they currently source from the Thunder Bay area (local within a 100km) and from outside the area (non-local). The following sections provide a breakdown of these characteristics by food groups (e.g. vegetables, fruits/berries, proteins/meat, dairy products, grains and oils, flours and baked goods) and additional details are provided for select food items where considerable quantities are identified. All of the amounts (weights, volume, units) presented in the following sections are taken directly from the businesses / organizations that were surveyed as part of this study.

PROCUREMENT / USE OF VEGETABLES

With respect to the annual procurement of vegetables, fresh potatoes represent the single largest vegetable commodity by weight with over 100,000kgs being sourced annually of which 63,000kgs are sourced from local producers and almost 38,000kgs are sourced from outside the area (Table 6). Most of the businesses/organizations are sourcing fresh, whole potatoes with russet potatoes being the most common sought variety. A very small number of businesses/organizations reported that they want their potatoes peeled and in at least once case, sliced. Most of the businesses/organizations expect potatoes to be cleaned/washed and they want local potatoes to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they would pay 10-15% more for local potatoes compared to non-local. It was noted that some distributors offer discounts on large volume sales and some businesses/organizations would be interested in the same discount pricing from local producers (this generally applies to all types of fresh produce).

Carrots represent the second largest vegetable commodity by weight with over 15,000kgs being sourced annually of which 6,000kgs are sourced from local producers and almost 9,000kgs are sourced from outside the area. Most of the businesses/organizations are sourcing fresh, whole carrots – washed and topped. One institution reported that they source a large volume of processed carrots (e.g. baby, coin, diced). Most of the businesses/organizations expect local carrots to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they would pay 10-40% more for local carrots compared to non-local.

Tomatoes represent the third largest vegetable commodity by weight with almost 13,000kgs being sourced annually of which close to 4,600kgs are sourced from local producers and over 8,300kgs are sourced from outside the area. Most of the businesses/organizations are sourcing fresh, whole tomatoes representing a range of tomato varieties including hothouse, beefsteak, Roma, cherry and field tomatoes. Several businesses/organizations reported that they source canned tomatoes in addition to fresh tomatoes. Most of the businesses/organizations expect local tomatoes to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they would pay 20-200% more for local tomatoes compared to non-local. There is considerable interest in high quality, flavourful tomatoes.

Onions represent the fourth largest vegetable commodity by weight with over 9,900kgs being sourced annually of which just over 900kgs are sourced from local producers and almost 9,000kgs are sourced from outside the area. Most of the businesses/organizations are sourcing fresh, whole white / yellow / red onions. Several institutions are also sourcing diced frozen onions. Most of the businesses/organizations expect local onions to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they would pay 5-20% more for local onions compared to non-local.

Various fresh lettuces / leafy greens are also being procured annually in sizable amounts. Almost 7,700kgs of spring mix greens are procured annually of which 2,000kgs are sourced from local producers and 5,600kgs are sourced from outside the area. Additionally, over 6,000 heads of iceberg lettuce, 6,000 heads of leafy lettuce and 11,000 heads of Romaine lettuce are procured annually with no to limited local procurement taking place for these commodities. Most of the businesses/organizations expect local lettuces to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they would pay 30-40% more for local spring mix greens, 5-30% more for local Romaine lettuce, and 10-20% more for local leafy lettuce compared to non-local. Businesses/organizations expect fresh lettuces to be unspoiled, clean and free of pest/insects and additionally in the case of spring mixes, most operations want this product to washed (in some cases they require triple washed).

Table 6: Amount of vegetables used by businesses / organizations in the prepared food sector

Vegetables	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Potatoes	101,297	63,520	37,777	kgs
Frozen fries	7,855	0	7,855	kgs
Carrots	15,225	6,324	8,901	kgs
Frozen sliced carrots, string beans	1,636	0	1,636	kgs
Onions	9,906	927	8,980	kgs
Tomatoes	12,954	4,599	8,355	kgs
English cucumber	8,703	4,671	4,032	units
Bell peppers	2,796	2,009	787	kgs
Spring mix greens	7,698	2,078	5,621	kgs
Romaine lettuce	11,304	0	11,304	heads
Iceberg lettuce	6,069	208	5,861	heads
Kale	945	359	585	kgs
Leaf lettuce	6,138	1,125	5,013	heads
Spinach	236	118	118	kgs
Napa cabbage	2,100	468	1,632	heads
Cabbage	4,861	2,547	2,315	heads
Broccoli	3,078	955	2,124	kgs
Cauliflower	172	0	172	heads
Beets	3,250	1,182	2,068	kgs
Zucchini	761	145	616	kgs
Celery	552	0	552	bunches
Rhubarb	605	0	605	kgs
Parsley	1,560	468	1,092	bunches
Cilantro	95	47	47	kgs
Basil	142	71	71	kgs
Garlic	121	26	95	kgs
Mushrooms	1,234	1,182	52	kgs

Businesses/organizations were invited to share details on vegetable product preferences related to packaging and processing. In general, the greatest demand is for fresh, whole vegetables. With respect to packaging preferences, the following specifications/units were most commonly identified:

- Whole potatoes – washed: 22.5kg bag, 10kg bag, 2.3kg bag
- Whole carrots – washed, topped: 22.5kg bag/box, 2.3kg bag
- Frozen, semi-processed carrots – diced: no unit specified
- Whole onions – clean of dirt: 22.5kg bag
- Frozen, semi-processed onions – diced: no unit specified
- Whole tomatoes – washed: 5kg case/flat
- Cucumbers – washed: 12 per case
- Spring mix lettuce – washed (in some cases triple washed): 1.5kg case/bag, 1kg bag
- Iceberg lettuce – clean of dirt: 12 per case
- Romaine lettuce – clean of dirt: 12 per case
- Beets – clean of dirt: 11k bag

PROCUREMENT / USE OF FRUITS AND BERRIES

With respect to the annual procurement of fruit, fresh and processed apples represent the single largest fruit commodity by weight with over 6,000kgs of fresh applies being sourced annually – none of which is sourced from local producers (Table 7). Most of the businesses/organizations want local apples to be unblemished and reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A small number of businesses/organizations indicated that they could accept blemished apples for use in baking and juicing.

With respect to berries, strawberries represent the largest berry commodity by weight with over 5,200kgs being sourced annually of which 960kgs are sourced from local producers and over 4,200kgs are sourced from outside the area. Blueberries represent the second largest berry commodity by weight with close to 4,000kgs being sourced annually of which 960kgs are sourced from local producers and over 3,000kgs are sourced from outside the area. There is also a considerable amount of mixed berries (e.g. raspberries, blueberries, blackberries) being sourced each year (over 2,000kgs) with almost all of this being sourced from outside the area. In general, many of the businesses/organizations source a combination of fresh and frozen berries and a small number of operations freeze local berries to extend their availability out of season. Businesses/organizations expect berries to be unspoiled and most want the local berries to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Table 7: Amount of fruits / berries used by businesses / organizations in the prepared food sector

Fruits / berries	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Apples	6,155	0	6,155	kgs
Apple sauce	1,136	0	1,136	kgs
Apple pie filling	500	0	500	kgs
Canned fruit cocktail	5,200	0	5,200	kgs
Strawberries	5,225	960	4,265	kgs
Blueberries	3,981	963	3,018	kgs
Raspberries	390	38	352	kgs
Mixed berries	2,175	24	2,151	kgs

Businesses/organizations were invited to share details on fruit / berry product preferences related to packaging and processing. In general, the greatest demand is for fresh, whole fruit but there is also interest in frozen berries as a way of stretching their use out of season. With respect to packaging preferences, the following specifications/units were most commonly identified:

- Apples – washed: 18kg case
- Strawberries – clean of dirt: pints, flats
- Strawberries – clean of dirt frozen, sliced: no unit specified
- Raspberries – clean of dirt: pints, flats
- Raspberries – clean of dirt, frozen: no unit specified
- Blueberries – clean of dirt: pints, flats
- Blueberries – clean of dirt, frozen: no unit specified
- Mixed berries – clean of dirt: pints, flats
- Mixed berries – clean of dirt, frozen: no unit specified

PROCUREMENT / USE OF PROTEINS

With respect to the annual procurement of beef products, roast beef cuts represent the single largest beef commodity by weight with over 22,000kgs being sourced annually of which 3,400kgs are sourced from local producers and almost 19,000kgs are sourced from outside the area (Table 8). Most of the businesses/organizations are sourcing fresh meat cuts for roasts. Most of the businesses/organizations want the meat cuts to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. A very small number of businesses/organizations indicated that they would pay 5% more for local beef meat cuts.

Ground beef represents the second largest beef commodity by weight with over 15,500kgs being sourced annually of which close to 10,000kgs are sourced from local producers and almost 5,600kgs are sourced from outside the area. Most of the businesses/organizations are sourcing fresh not frozen ground beef with a general preference for medium fat and/or lean meat. Most of the businesses/organizations want the product to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Only one business suggested that they would pay a premium for local ground beef (20% more) compared to non-local.

Table 8: Amount of beef products used by businesses / organizations in the prepared food sector

Beef	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground beef	15,572	9,996	5,576	kgs
Roast beef	22,286	3,423	18,864	kgs
Striploin	473	0	473	kgs
Beef patties	2,862	1,592	1,270	kgs
Stewing beef	591	591	0	kgs
Whole beef side	1,718	1,295	423	kgs
Beef ribs	3,055	0	3,055	kgs
Beef tenderloin	75	0	75	kgs
Veal	1,864	1,864	0	kgs
Ground veal	364	364	0	kgs
Wieners	1,080	0	1,080	kgs

With respect to the annual procurement of pork products, pork loin cuts represent the single largest pork commodity by weight with over 13,000kgs being sourced annually of which 1,000kgs are sourced from local producers and 12,000kgs are sourced from outside the area (Table 9). Most of the businesses/organizations are sourcing fresh meat cuts and want the meat cuts to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Bacon represents the second largest pork commodity by weight with over 11,600kgs being sourced annually of which just 236kgs are sourced from local producers and 11,400kgs are sourced from outside the area. Most of the businesses/organizations are sourcing fresh bacon and one organization is also procuring a small amount of pre-cooked bacon. Most of the businesses/organizations want the product to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Only one business suggested that they would pay a premium for bacon (10% more) compared to non-local.

Table 9: Amount of pork products used by businesses / organizations in the prepared food sector

Pork	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground pork	4,045	4,045	0	kgs
Pork loin	13,093	1,025	12,067	kgs
Butt roast	2,789	71	2,718	kgs
Whole pork side	727	582	145	kgs
Bacon	11,653	236	11,416	kgs
Pepperoni	4,136	0	4,136	kgs
Ham	2,539	0	2,539	kgs
Pork sausage	6,036	0	6,036	kgs
Pork ribs	1,136	0	1,136	kgs

The businesses/organizations identified substantial quantities of chicken and egg products that they procure on an annual basis and all of this product currently originates from outside the Thunder Bay area. The is largely the result of there being no commercial chicken processing facilities in Thunder Bay and there are no commercial egg producers in the area (although there is a local egg distributor).

Chicken breasts represent the single largest chicken commodity by weight with over 36,000kgs being sourced annually (Table 10). The highest demand is typically for boneless breasts and there is interest in both fresh and frozen products as well as skin on and skinless products. Most of the businesses/organizations want the product to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Several businesses suggested that they would pay a premium for local chicken breasts (5-10% more) compared to non-local.

The businesses/organizations procure close 43,000 dozen eggs annually. The highest demand is typically for Grade A eggs of medium or large size. Many of the businesses/organizations source their eggs through a local commercial distributor and at least one business is exploring sourcing free range eggs through a local producer. Most of the businesses/organizations want the eggs and egg products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Several businesses suggested that they would pay a premium for local whole shell eggs (5-10% more) compared to non-local.

Table 10: Amount of chicken/egg products used by businesses / organizations in the prepared food sector

Chicken / eggs	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Chicken breast	36,474	0	36,474	kgs
Chicken thighs	1,418	0	1,418	kgs
Chicken wings	416	0	416	kgs
Whole chickens	1,630	0	1,630	kgs
Chicken diced, fingers, etc.	11,464	0	11,464	kgs
Turkey	4,751	0	4,751	kgs
Whole turkeys	2,557	0	2,557	kgs
Eggs whole shell	42,850	0	42,850	dozen
Eggs pre-cooked peeled	4,160	0	4,160	kgs
Liquid eggs	26,212	0	26,212	kgs

With respect to the annual procurement of fish products, salmon represents the single largest fish commodity by weight with over 4,000kgs being sourced annually of which 800kgs are sourced from local producers and almost 3,300kgs are sourced from outside the area (Table 11). Walleye/pickerel and trout are also procured but in much smaller annual quantities. In all cases the businesses/organizations are sourcing fresh, not frozen fish and at least one business suggested that they would pay a premium for local trout (10% more) compared to non-local.

Table 11: Amount of fish products used by businesses / organizations in the prepared food sector

Fish	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Trout sides	218	109	109	kgs
Walleye / pickerel fillets	484	227	257	kgs
Salmon – whole	4,091	818	3,273	kgs

Businesses/organizations were invited to share details on protein product preferences related to packaging and processing. In general, the greatest demand is for fresh, not frozen meat products. With respect to packaging preferences, the following specifications/units were most commonly identified:

- Ground beef – medium-lean fat content: 5kg case
- Pork loin: 10kg case
- Bacon: 5kg case, 10kg case
- Whole chickens – fresh and frozen: no unit specified
- Chicken breasts – fresh and frozen, skinless, boneless: no unit specified
- Whole turkeys – fresh and frozen: no unit specified
- Whole eggs – medium-large size, Grade A: carton (12), tray (30), case (15 dozen)
- Fish (pickerel walleye, trout) – fresh, chilled: no unit specified

PROCUREMENT / USE OF DAIRY PRODUCTS

The businesses/organizations identified substantial quantities of fluid milk products that they procure on an annual basis but only a small proportion of this product appears to be locally sourced. It's important to note that many of the operations we spoke to are uncertain about exactly where the milk they purchase is produced and it was often assumed that the milk originates from outside the Thunder Bay area.

The most common variety of milk sourced by volume is 2% milk with over 70,000 litres being sourced annually of which 1,800 litres are sourced from local producers and almost 69,000 litres are sourced from outside the area (Table 12). Most of the businesses/organizations want the fluid milk products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Several businesses suggested that they would pay a premium for local fluid milk products (5-10% more) compared to non-local.

With respect to the annual procurement of cheese products, blended cheese products (e.g. brand specific for franchise) and mozzarella represent the largest cheese commodities by weight with a combined 35,600kgs being sourced annually and all of this product currently originates from outside the Thunder Bay area (Table 12). A variety of gouda products are also procured in large quantities and all of this appears to be sourced locally. Most of the businesses/organizations want the cheese products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer as this food item is normally a pricey item.

Table 12: Amount of dairy products used by businesses / organizations in the prepared food sector

Dairy / dairy substitute	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Skim milk	3,744	3,744	0	litres
Milk 2%	70,680	1,872	68,808	litres
Milk 10%	1,820	0	1,820	litres
Milk 35%	1,564	0	1,564	litres
Buttermilk	520	0	520	litres
Milk combined fluid products - skim, 1%, 2%, chocolate	19,080	0	19,080	litres
Butter	1,273	0	1,273	kgs
Soy milk	1,820	0	1,820	litres
Cheese - blended (content not specified)	17,960	0	17,960	kgs
Cheese – mozzarella	17,706	0	17,706	kgs
Cheese – gouda	2,647	2,647	0	kgs
Cheese - gouda extra old	1,440	1,440	0	kgs
Cheese - gouda curds	2,334	2,334	0	kgs
Cheese - gouda smoked	118	118	0	kgs
Cheese – cheddar	1,610	0	1,610	kgs
Cheese – swiss	969	0	969	kgs
Cheese – feta	258	0	258	kgs
Cheese - other - brie, Havarti	118	0	118	kgs

Businesses/organizations were invited to share details on dairy product preferences related to packaging and processing. With respect to packaging preferences, the following specifications/units were most commonly identified:

- Fluid milk: 2 litre cartons
- Cheddar cheese – blocks, sliced and shredded: no unit specified
- Gouda – blocks: no unit specified
- Swiss cheese – sliced and shredded: no unit specified
- Mozzarella – cubed and shredded: 2kg bag

PROCUREMENT / USE OF PULSE CROPS, GRAINS & OILS

With respect to the annual procurement of pulses and grains, lentils represent the single largest pulse commodity by weight with over 4,500kgs being sourced annually and rolled oats represent the single largest grain commodity by weight with over 3,400kgs being sourced annually. All of this product currently originates from outside the Thunder Bay area (Table 13). Most of the businesses/organizations want the pulse/grain products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Table 13: Amount of grain/pulse products used by businesses / organizations in the prepared food sector

Grains / pulses	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Lentils	4,514	0	4,514	kgs
Oats	3,473	0	3,473	kgs
Barley	473	0	473	kgs
Farro	136	0	136	kgs
Chickpeas	345	0	345	kgs
Navy beans	300	0	300	kgs
Split green peas	150	0	150	kgs
Split yellow peas	150	0	150	kgs
Quinoa	75	0	75	kgs

With respect to the annual procurement of oils, canola oil represents the single largest oil variety by volume with over 15,400 litres being sourced annually of which 8,300 litres are sourced from local producers and 7,000 litres are sourced from outside the area (Table 14). Most of the businesses/organizations want the oil products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Table 14: Amount of oil products used by businesses / organizations in the prepared food sector

Oils	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Vegetable oil	7,100	0	7,100	litres
Canola oil	15,424	8,336	7,088	litres
Olive oil	240	0	240	litres

Businesses/organizations were invited to share details on pulse / grain product preferences related to packaging and processing. In general, the greatest demand is for dried pulses / grains (no product units specified). With respect to oils, the greatest demand is for 19 litre pails of canola oil.

PROCUREMENT / USE OF FLOUR AND BAKED GOODS

With respect to the annual procurement of flour products, all-purpose flour represents the single largest flour commodity by weight with over 17,600kgs being sourced annually of which 530kgs are sourced from local producers and 17,000kgs are sourced from outside the area (Table 15). Most of the businesses/organizations want the all-purpose flour to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Fine sifted all-purpose flour represents the second largest flour commodity by weight with almost 8,000kgs being sourced annually of which 2,300kgs are sourced from local producers and 5,600kgs are sourced from outside the area. Most of the businesses/organizations want the product to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Rapid rise flour represents the third largest flour commodity by weight with 5,900kgs being sourced annually and all of this product currently originates from outside the Thunder Bay area. Most of the businesses/organizations want this product to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Table 15: Amount of flour products used by businesses / organizations in the prepared food sector

Flour	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Flour - all purpose	17,618	530	17,088	kgs
Flour - fine sifted all purpose	7,964	2,364	5,600	kgs
Flour - rapid rise	5,909	0	5,909	kgs
Flour - whole wheat	2,920	2,920	0	kgs
Flour – semolina	2,600	260	2,340	kgs
Flour – rye	347	174	174	kgs

With respect to the annual procurement of baked goods, bread loaves (all varieties including white, whole wheat, rye) represent a substantial product by units with almost 18,700 loaves being sourced annually of which over 7,500 loaves are sourced from local bakers and 11,000 loaves are sourced from outside the area (Table 16). Most of the businesses/organizations want the loaves to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Several businesses suggested that they would pay a premium for locally made loaves of bread (5-10% more) compared to non-local.

Kaiser rolls are also procured in substantial quantities with over 17,600 rolls sourced annually and all of this product currently originates from local bakers in the Thunder Bay area. Most of the businesses/organizations want the Kaiser rolls to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Several businesses suggested that they would pay a premium for locally made Kaiser rolls (5-10% more) compared to non-local.

Table 16: Amount of baked goods used by businesses / organizations in the prepared food sector

Baked goods	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Kaiser rolls – mixed – white, whole wheat, rye	17,680	17,680	0	units
Bread loaves – mixed - white, whole wheat, rye	14,276	3,136	11,140	units
Bread loaves – rye	4,420	4,420	0	units
Hot dog buns	31,200	0	31,200	units
Hamburger buns	3,600	0	3,600	units
Panini – frozen	355	0	355	kgs
Wraps – frozen	355	0	355	kgs

Businesses/organizations were invited to share details on flour product preferences related to packaging and processing. In general, the greatest demand is for flour in 10kg or 20kg bags. With respect to baked goods, there is demand for sliced and unsliced whole loaves of white, whole wheat, and rye bread (preferred packaged units of baked goods were not specified).

PROCUREMENT / USE OF OTHER FOOD PRODUCTS

A very small number of businesses/organizations reported on their honey and maple syrup procurement (Table 17). Businesses are very price sensitive to these commodities, especially maple syrup. One operation noted that they do not use the birch syrup that is produced locally because it does not meet their flavour needs. Preferred product units were not specified for these commodities.

Table 17: Amount of other food products used by businesses / organizations in the prepared food sector

Other food products	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Honey	275	0	275	kgs
Maple syrup	142	0	142	litres

CONCLUSIONS

This sector has a varied set of requirements for local food. Reliability, dependability, quality and price are all very important. Some of the larger suppliers to this sector have adapted their deliveries and marketing to the needs of the sector. Providing menu suggestions would be an example.

Personal connections are often important because of the particular needs of the business. The potential for expansion depends on the ability of the suppliers to connect with the owners/managers, to provide reliable dependable service and to have excellent/reliable communications between the business and the supplier.

Where people are not purchasing locally it was often because of a past negative experience combined with an excellent relationship with a current supplier.

3.1.2 FOOD PROCESSORS

INTRODUCTION

These are businesses which buy quality products and add value to them by processing them/packaging them for distribution to retailers and or consumers. They are an important element of the food value chain since they have strong economic linkages (backward to suppliers and forward to other value added processors such as restaurants. The processes they apply to the products/foods purchased can be as simple as a standard (cello for example) package and label to a more sophisticated transformation of the product into gourmet food products. The potential for value added processing is vast and adds significant value to the local economy.

A total of 28 businesses from the local food processing sector were interviewed as part of Thunder Bay and Area Food and Market Study. The businesses represent a broad cross section of processing activities including meat / fish processing, beverage production, baked goods and other processing.

Close to 40% of the businesses have been in operation for more than 20 years and close to 40% have been in operation for 5 years or less. Approximately 50% of the businesses employ five or fewer individuals and 15% employ 10 or more individuals. Collectively the businesses have over 175 employees (full-time, part-time and seasonal combined).

Approximately 80% of the businesses (23 of 28) reported that they currently buy some amount of food grown / harvested within 100km of Thunder Bay (or food products made with ingredients grown within 100km of Thunder Bay).

Approximately 44% of the businesses reported that a key motivation for buying locally grown/harvested food items is that it benefits the local economy. Other key motivators for buying local include the belief that locally grown/harvested food items are higher quality (28%), their production promotes environmental health (20%) and customers are interested in local food (20%) (Table 18).

Table 18: Motivation of businesses for buying local (n=25)

Motivation for buying local	Number	Percent
Contributes to the local economy	11	44.0%
Local is higher quality	7	28.0%
Promotes environmental health	5	20.0%
Customers interested / demand local food	5	20.0%
Local is fresher	3	12.0%
Using local foods as a marketing tool	3	12.0%
Local foods are cost comparable to non-local	2	8.0%
Interested in chemical / additive free foods	2	8.0%
Interested in animal welfare	1	4.0%
Important to have a relationship with farmers	1	4.0%

Respondents were allowed to identify more than one motivator.

With respect to the factors that dissuade businesses from buying locally grown/harvested food items, the most common concerns identified include consistency in availability and/or seasonality, cost, and insufficient overall volume of product (Table 19).

Table 19: Motivation of businesses for not buying local (n=21)

Motivation for not buying local	Number	Percent
Consistency in availability and/or seasonality concerns	11	52.4%
High cost concerns	9	42.9%
Insufficient volume of product	5	23.8%
Delivery / accessibility challenges	2	9.5%
Consistency in food standards / quality concerns	1	4.8%
Lack of sufficient storage / processing equipment	1	4.8%
Farmers are not producing the food items they want	1	4.8%

Respondents were allowed to identify more than one factor.

Respondents were asked if they would consider purchasing a local product of higher quality at a higher cost than a non-local product of lesser quality. Of the 23 businesses that responded to this question, 70% indicated that they would and 30% reported that they would with some qualifications (mainly that local items cannot be priced significantly higher than non-local food items and that local producers need to consistently deliver high quality food items).

Businesses were asked to identify the key characteristics they think of when looking for ‘higher quality’ food items. The most common features identified include flavourful and/or appealing appearance, freshness and good baking / cooking performance (Table 20).

Table 20: Attributes that businesses associate with ‘higher quality’ food (n=21)

Attributes	Number	Percent
Flavourful and/or appealing appearance	12	57.1%
Freshness	4	19.0%
Good baking / cooking performance	4	19.0%
Locally grown	3	14.3%
Chemical free / no additives	2	9.5%
Nutritious	2	9.5%
Consistent quality / standard	1	4.8%
Highest quality / standard	1	4.8%
Minimal processing	1	4.8%

Respondents were allowed to identify more than one attribute.

Approximately, 77% of the businesses that reported using locally grown/harvested food items believe that local foods add value to their operation. A further 18% reported that they don’t feel the use of local food items adds value to their operation and 5% are unsure.

Businesses were asked to share their views on what would make it easier for them to purchase local food. The most common factor identified is to have access to consistent volumes of food items throughout the year (36%), offer local foods at a price that is reasonably comparable to prices being offered through distributors (27%), and improve local food access / delivery mechanisms in Thunder Bay to make it more convenient. (Table 21).

Table 21: What would make it easier for your business to purchase local food? (n=22)

Factors	Number	Percent
Consistency of food volume / availability	8	36.4%
Reasonably / competitively priced foods	6	27.3%
Improved delivery / access mechanism (e.g. direct delivery, centralized location)	4	18.2%
Greater variety / selection of locally produced items	3	13.6%
Maintaining supply out of season	2	9.1%
Consistency of food quality / standards	1	4.5%
Need contracts to assure market for the product as it is costly to scale up	1	4.5%
More local entrepreneurs to engage in production / harvesting of local foods	1	4.5%
Processing before delivery (e.g. washing, dicing)	1	4.5%
Nothing at this time	3	13.6%

Respondents were allowed to identify more than one factor.

CURRENT PROCUREMENT OF LOCAL / NON-LOCAL FOOD ITEMS

Businesses were invited to share details on the amounts of food items they procure/source for their operations on an annual basis. They were advised to consider items that they use in considerable quantities and that could potentially be grown / harvested in the Thunder Bay area. They were also asked to distinguish between the amounts they currently source from the Thunder Bay area (local within a 100km) and from outside the area (non-local). Some businesses are very specialized in their processing operations and work with a narrow range of food products. The following sections provide a breakdown of these characteristics by food groups (e.g. vegetables, fruits/berries, proteins/meat, dairy products, grains and oils, flours and baked goods) and additional details are provided for select food items where considerable quantities are identified. All of the amounts (weights, volume, units) presented in the following sections are taken directly from the businesses that were surveyed as part of this study.

PROCUREMENT / USE OF VEGETABLES

With respect to the annual procurement of vegetables, fresh tomatoes represent the single largest vegetable commodity by weight with over 70,000kgs being sourced annually and almost all of this quantity is sourced from outside the area (Table 22). The bulk of this demand is for fresh field tomatoes as they are viewed as being more flavourful than greenhouse tomatoes. Businesses using tomatoes in large quantities noted that the product has to be competitively priced (e.g. within a few cents per kg of tomatoes offered through wholesalers). A small number of businesses using small amounts of tomatoes indicated that they would pay up to 10% more for local tomatoes compared to non-local.

Rhubarb represents the second largest vegetable commodity by weight with 3,400kgs being sourced annually and all of this quantity is sourced from outside the area. Key requirements are that the product is fresh, flavourful, and clean (no dirt, free of bugs). One business noted that they will purchase rhubarb in volume while in season and freeze it to extend the season. It is also important that the product is reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Arugula represents the third largest vegetable commodity by weight with 3,400kgs being sourced annually and all of this quantity is sourced from outside the area. Key requirements are that the product is fresh, flavourful, and clean (no dirt, free of bugs). One business noted that they will purchase arugula through the prime season but are also interested in exploring greenhouse products to extend the season. It is important that the product is reasonably/competitively priced.

Carrots represent the fourth largest vegetable commodity by weight with 745kgs being sourced annually and all of this quantity is sourced from outside the area. Key requirements are that the product is fresh, unpeeled and consistent in quality. It is important that the product is reasonably/competitively priced.

Bell peppers represent the fifth vegetable commodity by weight with 643kgs being sourced annually and all of this quantity is sourced from outside the area. Key requirements are that the product is fresh and consistent in quality. It is important that the product is reasonably/competitively priced.

Romaine lettuce is also being procured annually in sizable amounts. Over 3,600 heads of Romaine lettuce are procured annually with no local procurement taking place. Key requirements are that the product is fresh, clean and consistent in quality. It is important that the product is reasonably/competitively priced.

Table 22: Amount of vegetables used by food processors

Vegetables	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Tomatoes	71,146	101	71,045	kgs
Romaine lettuce	3,640	0	3,640	heads
Carrots	745	0	745	kgs
Bell peppers	643	0	643	kgs
Jalapeno peppers	3,409	3,409	0	kgs
Onions	165	71	95	kgs
Beets	250	250	0	kgs
Rhubarb	3,409	0	3,409	kgs
Arugula	3,409	0	3,409	kgs
Rosemary	3,409	3,409	0	kgs
Basil	85	85	0	kgs
Garlic	273	0	273	kgs
Garlic scapes	250	250	0	kgs
Mushrooms	455	45	410	kgs

The businesses did not go into detail on their preferences for packaging units for vegetables.

PROCUREMENT / USE OF FRUITS AND BERRIES

With respect to the annual procurement of fruit, fresh apples represent the single largest fruit commodity by weight with approximately 3,400kgs of fresh applies being sourced annually – all of which is sourced locally (Table 23). Key requirements are that the product is fresh, flavourful, and clean (no dirt, free of bugs). It is also important that the product is reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

With respect to berries, raspberries represent the largest berry commodity by weight with 550kgs being sourced annually and all of this quantity is sourced from outside the area. Strawberries represent the second largest berry commodity by weight with 370kgs being sourced annually and all of this quantity is sourced from outside the area. Most of the businesses are interested in fresh berries but some also use frozen berries depending on availability. Businesses expect berries to be unspoiled and at least one business requires organic berries. Several of the businesses reported that they would pay a premium for local berries (10-20% more) compared to non-local.

Table 23: Amount of fruits / berries used by food processors

Fruits / berries	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Apples	3,409	3,409	0	kgs
Strawberries	422	52	371	kgs
Raspberries	559	9	551	kgs

The businesses did not go into detail on their preferences for packaging units for fruit / berries.

PROCUREMENT / USE OF PROTEINS

With respect to the annual procurement of beef products, approximately 8,200kgs of eye of round and 780kgs of ground beef are sourced annually by local processors and all of this quantity is coming from outside the area (Table 24). These products need to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. With respect to the eye of round, the product must be fresh not frozen as this is better suited for value added processing (e.g. marinating).

One processor noted that they work exclusively with locally raised cattle and other livestock (e.g. hogs, lambs, goats) and that a large volume of their product arrives in the last four months of the year when many producers/suppliers ship their stock. It was noted that some producers are purposely doing a better job with their breeding schedules to make more use of the slower periods at the processing facility. They process their meat products to order (cut, wrapped, fresh, frozen) and while they prefer to work with side cuts they will also accommodate smaller orders (e.g. split sides, fronts, hinds). A major challenge is that too few businesses are willing to take a side cut of beef (e.g. most restaurants just want the premium cuts - ribeye and tenderloin) and this results in a lot of leftover cuts that goes into ground beef.

Table 24: Amount of beef products used by food processors

Beef	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground beef	780	0	780	kgs
Beef – combined custom cuts and ground beef	111,364	111,364	0	kgs
Roast beef – eye of round	8,182	0	8,182	kgs

With respect to the annual procurement of pork products, approximately 88,000kgs of pork meat cuts (shoulder, loin, belly) are being sourced from outside the area (Table 25). Businesses typically want fresh not frozen meat cuts and one business specified the need for boneless cuts for the purpose of sausage making. Businesses want the meat cuts to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. One business suggested that they would pay a premium for local pork belly (5% more) compared to non-local.

Table 25: Amount of pork products used by food processors

Pork	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground pork	473	473	0	kgs
Pork shoulder	10,909	0	10,909	kgs
Pork loin	1,309	0	1,309	kgs
Pork belly	5,020	0	5,020	kgs
Pork - combined cuts	118,182	47,273	70,909	kgs
Pepperoni	473	0	473	kgs
Ham	142	0	142	kgs

The businesses procure approximately 23,000 dozen eggs annually and all of this quantity is produced from outside the area. Businesses want the eggs and egg products to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. Businesses are typically interested in medium-large size, Grade A eggs.

Table 27: Amount of egg products used by food processors

Eggs	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Eggs whole shell	23,206	200	23,006	dozen
Liquid eggs – whole egg	26,000	0	26,000	litres

With respect to the annual procurement of fish products, businesses source over 39,000kgs of local fish annually (Table 28). Local prices typically reflect the market prices charged by commercial fishermen. One business suggested that local fish has growing importance for the tourism sector as visitors often want to sample something local from the region.

Table 28: Amount of fish products used by food processors

Fish	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Total fish - whitefish, herring, lake trout, walleye, pike	39,182	39,182	0	kgs

The businesses did not go into detail on their preferences for packaging units for proteins.

PROCUREMENT / USE OF DAIRY PRODUCTS

Close to one million litres of raw milk is used by the businesses and all of this is produced locally. Fresh, quality milk is important for the value added products made by these businesses (e.g. milk, cream, yogurt, cheese). Additionally, over 8,800kgs of 3% and 35% fluid milk products and 6,000kgs of butter are being procured annually by other businesses and all of this quantity is coming from outside the area (Table 29). Most of the businesses want the processed milk inputs to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. However, two businesses noted that they would pay a premium for local fluid milk products (5-20% more) compared to non-local. The businesses did not go into detail on their preferences for packaging units for dairy products.

Table 29: Amount of dairy products used by food processors

Dairy / dairy substitute	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Milk – raw	958,200	958,200	0	litres
Milk 3%	4,160	0	4,160	litres
Milk 35%	4,680	0	4,680	litres
Butter	6,027	0	6,027	kgs
Cheese – various	208	0	208	kgs
Cheese – gouda	1,075	1,075	0	kgs

PROCUREMENT / USE OF OILS

With respect to the annual procurement of oils, over 6,000 litres of canola oil and over 5,000 litres of vegetable oil are being produced annually and all of this quantity is coming from outside the area (Table 30). Most of the businesses want the oil products to be reasonably/competitively priced with what the large volume. However, two businesses reported they would pay a premium for local canola oil (10% more) compared to non-local. Businesses are also procuring over 13,000kgs of shortenings annually and all of this quantity is being sourced from outside the area. Businesses want shortenings to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. The businesses did not go into detail on their preferences for packaging units for oil products.

Table 30: Amount of oil products used by food processors

Oils	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Vegetable oil	5,200	0	5,200	litres
Canola oil	6,240	0	6,240	litres
Olive oil	390	0	390	litres
Shortenings	13,728	0	13,728	kgs

PROCUREMENT / USE OF FLOUR AND GRAINS

With respect to the annual procurement of flour products, all-purpose flour represents the single largest flour commodity by weight with over 73,000kgs being sourced annually of which 433kgs are sourced from local producers and 72,800kgs are sourced from outside the area (Table 31).

Whole wheat flour represents the second largest flour commodity by weight with over 25,000kgs being sourced annually of which 17,700kgs are sourced from local producers and 7,500kgs are sourced from outside the area.

Other flour products being procured in substantial quantities include rapid rise flour (over 23,000kgs being sourced annually and all of this comes from outside the area), rye flour (over 13,000kgs being sourced annually and all of this product is locally produced), and semolina (almost 13,000kgs being sourced annually and all of this product currently comes from outside the area).

Many of the businesses want flour products that are reasonably/competitively priced with what the large volume distributors/wholesalers can offer. However, several businesses reported that they would pay a premium for certain local products including whole wheat flour (5% more), spelt flour (5% more), rye flour (5% more), semolina (15-20% more), and unbleached white flour (20%). Many of the businesses emphasized that the quality of flour products must be consistent to ensure that the desired baking standards are achieved at all times. In general, the greatest demand is for flour in 10kg, 20kg or 25kg bags.

Table 31: Amount of flour / grain products used by food processors

Flour	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Flour - all purpose	73,233	433	72,800	kgs
Flour - sifted whole wheat	6,000	6,000	0	kgs
Flour - rapid rise	23,636	0	23,636	kgs
Flour - whole wheat	25,349	17,785	7,564	kgs
Flour – semolina	12,920	0	12,920	kgs
Flour – durum	1,040	0	1,040	kgs
Flour – spelt	1,891	0	1,891	kgs
Flour – rye	13,355	13,355	0	kgs
Rolled oats	728	0	728	kgs

PROCUREMENT / USE OF OTHER FOOD PRODUCTS

A total of 330,000kgs of malt is being procured annually. This is being sourced through a local business that sources its barley from Manitoba, Saskatchewan, Ontario and Quebec (Table 32). It is believed that some portion of the malt is local but this is difficult to determine as grains are pooled in processing. Malt needs to come from inspected facilities that conduct testing for consistent standards (e.g. sugar content). Malt is most commonly purchased in bulk quantities (one tonne totes) or 25kg bags.

A total of 3,000kgs of hops are being procured annually and all of this quantity is coming from outside the area. Hops need to be in pelletized form and have unvarying consistency. Hops are most commonly purchased in industry standard bags of 11kg or 22kg.

Table 32: Amount of other food products used by food processors

Other food products	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Maple syrup	36	0	36	litres
Malt	330,000	32,500	297,500	kgs
Hops	3,000	0	3,000	kgs

CONCLUSIONS

Consistent with other sectors, the supply of agriculture and food products to food processors had several predictable requirements. The food processors wanted the equivalent or perhaps slightly higher (10%) prices for local products. They want supply to be predictable and on time; they want as much pre-processing done as possible; they want reliable delivery; and they want equivalent or higher quality when compared to alternatives.

Large quantities of the items identified here are sourced from outside the area and could be produced locally. These items have been identified in the tables above.

3.1.3 FOOD DISTRIBUTORS

INTRODUCTION

These are businesses involved in the distribution of food to wholesalers, retailers and processors. This is a sector which is dominated by a number of national food distribution companies. Our focus here was mostly on distributors with a known interest in local product.

A total of five businesses from the local food distributing sector were interviewed as part of Thunder Bay and Area Food and Market Study. Four of the businesses are locally based independent operations and one business is part of a national foodservice distributor.

Two of the businesses are currently procuring locally grown / harvested foods within 100km of Thunder Bay (or food products made with ingredients grown within 100km of Thunder Bay). One business has procured locally grown / harvested foods in the past and noted that they may do so again. The other two businesses are not sourcing food items from the Thunder Bay area but they are sourcing local foods from other parts of Ontario and western Canada.

Three of the businesses reported three different reasons for what motivates them buy locally grown/harvested food items. One business noted that they feel a social responsibility to support / provide a point of entry for local farmers and they like building community connections and partnerships. Another business noted they are interested in food sustainability and food security and work to source from Canada as much as possible. The third business noted that they use locally grown / harvested foods as a marketing tool to distinguish their business operation from others.

With respect to the factors that dissuade businesses from buying locally grown/harvested food items, the most common concerns identified include consistency in availability and/or seasonality (4 businesses), insufficient overall volume of product (3), and consistency in standards (2). Other factors noted by distributors include farmers not producing the food items they want (1) and the higher cost of local food items (1).

Respondents were asked if they would consider purchasing a local product of higher quality at a higher cost than a non-local product of lesser quality. Two of the business confirmed that that they would procure higher priced local food items but with the qualification that the local products meet consistent food quality standard and safety criteria. Two businesses noted that the short growing season in Thunder Bay presents challenges when trying to procure local foods in the desired quantities and the overall volume of production for many locally grown items is limited which can serve to drive up prices significantly compared to non-local items of a similar quality.

Businesses were asked to identify the key characteristics they think of when looking for ‘higher quality’ food items. The most common features identified include flavourful and/or appealing appearance, freshness and high standard/quality.

The distributors presented mixed views on the question of whether locally grown/harvested food items add value to their operations. One business emphasized that local foods do indeed add value but this is only for a certain segment of their customer base (e.g. 35-40%) that purposefully use local foods in their marketing and/or out of personal interest to support local producers. Another business noted it can be difficult to gain any added value unless the local products are reasonably priced compared to non-local options. It was emphasized that only a segment of the population is interested in and/or has the means to pay a premium price for local. A third business commented that any potential added value can be negated if local food quality standards are not consistent from week to week. It was noted that many consumers need and/or expect to find a consistent level of food standard/ quality from week to week and distributors attempt to source from producers/operations that can deliver on this. Bakeries were provided as an example of a client that are very loyal to their brands as they want a flour product that will consistently meet their expectations and they are very resistant to try other options even if it is a cheaper similar product. This message is consistent with what we heard from the bakery operators (see section 3.1.2).

Businesses were asked to share their views on what would make it easier for them to purchase local food. The most common factors identified are to have access to consistent volumes of local food items throughout the year and to have access to these products at a reasonable price. One business reported that about a third of their customer base demonstrates an interest in local products and is willing to pay up to 15% more for local product but they are unable to secure Thunder Bay products in this price range and the quantities he would require for doing consistent business. Another business operator acknowledged that they have not conducted a detailed price comparison of local vs. non-local food items to determine if there are significant differences in pricing and suggested it would be beneficial for distributors as well as other elements of the food chain (e.g. retail, prepared food sector) to learn more about this and who all of the local producers are. The operator noted that he is only aware of a small number of local producers and having more information on the capacity of local growers would be helpful in making procurement decisions. A third business operator specifically identified the need for all of their suppliers to meet Canadian Food Inspections Agency food safety guidelines and that producers need to demonstrate that they are following the guidelines.

CURRENT PROCUREMENT OF LOCAL / NON-LOCAL FOOD ITEMS

Businesses were invited to share details on the amounts of food items they procure/source for their operations on an annual basis. Not all of the businesses were able to provide data and those that did focused on a few select items. The following sections provide a breakdown of these characteristics by food groups (e.g. vegetables, proteins/meat, flours) and additional details are provided for select food items where considerable quantities are identified. All of the amounts (weights, volume, units) presented in the following sections are taken directly from the businesses that were surveyed as part of this study.

PROCUREMENT / USE OF VEGETABLES

With respect to the annual procurement of vegetables, fresh potatoes represent the single largest vegetable commodity by weight with over 530,000kgs being sourced annually and all of this quantity is sourced from outside the area (Table 33). Russet and red potatoes are among the more common varieties sourced. Businesses expect potatoes to be cleaned/washed and they should be sorted by size (large vs small). Local potatoes need to be reasonably/competitively priced with potatoes from Winnipeg and Southern Ontario. One business noted that they are aware of the local potato production but pointed out that there is a seasonal rush for these potatoes which limits what they can access.

Carrots represent the second largest vegetable commodity by weight with over 175,000kgs being sourced annually and all of this quantity is sourced from outside the area. Carrots should be washed and topped and ideally bagged (2lbs, 3lbs, 5lbs). Local carrots need to be reasonably/competitively priced with potatoes from Winnipeg and Southern Ontario. One business noted that they are aware of the local carrot production but pointed out that the volume is limited and inconsistent. One business indicated that some clients would pay 5% more for local carrots compared to non-local.

Tomatoes represent the third largest vegetable commodity by weight with over 110,000kgs being sourced annually and all of this quantity is sourced from outside the area. Tomatoes should be fresh, clean, and firm with good colour. Field tomatoes are sourced in season and greenhouse tomatoes are sourced out of season. Some clients are prepared to pay a premium for local, quality tomatoes. One business indicated that up to 40% of their clients would pay up to 15% or more for local tomatoes compared to non-local.

Cabbage represents the fourth largest vegetable commodity by weight with over 85,000kgs being sourced annually and all of this quantity is sourced from outside the area. Cabbage should be fresh, chilled and undamaged. One business noted that suppliers must have chilling facilities to ensure that freshness is maintained. Local cabbage needs to be reasonably/competitively priced with cabbage from Winnipeg and Southern Ontario.

Sweet corn is also being procured annually in sizable amounts. Over 32,000 cobs are procured annually and all of this quantity is sourced from outside the area. Sweet corn should be fresh and chilled with the husk on, it must be high quality (e.g. sufficiently mature/ripe, free of insects, free of bird damage) and bagged (e.g. 60 cobs per bag). Local sweet corn needs to be reasonably/competitively priced with corn from Winnipeg and Southern Ontario.

Other vegetables that were identified as having great potential for local expansion include onions bell peppers, and lettuces and spring mixes.

Table 33: Amount of vegetables procured by food distributors

Vegetables	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Potatoes	531,818	0	531,818	kgs
Carrots	175,382	0	175,382	kgs
Tomatoes	111,418	0	111,418	kgs
Cabbage	85,454	0	85,454	heads
Sweet corn	32,400	0	32,400	cobs

With respect to packaging preferences, the following specifications/units were most commonly identified:

- Whole potatoes – washed, sorted by large and small sizes: 22.5kg bags/boxes
- Whole carrots – washed, topped, sorted by similar size in each bag: 22.5kg bales containing 10 x 2.3kg bags or 16 x 1.4kg bags or 24 X 1kg bags
- Whole cabbage – clean of dirt, chilled: 22.5kg box/case
- Whole tomatoes – washed: 13.5kg case
- Sweet corn – with husk free of dirt, free of insects: bags (60 cobs per bag)

PROCUREMENT / USE OF PROTEINS

With respect to the annual procurement of beef products, roast beef cuts represent the single largest beef commodity by weight with 6,800kgs being sourced annually (inside round and outside flat combined) and all of this quantity is sourced from outside the area (Table 34). All meat products need to be high quality and sourced from federally or provincially inspected plants. Clients are very price sensitive when it comes to meat products and local products need to be reasonably/competitively priced with meat products from Winnipeg and Southern Ontario.

Ground beef is also sourced in substantial quantities with over 4,500kgs being sourced annually and all of this quantity coming from outside the area. Ground beef needs to be high quality and sourced from federally or provincially inspected plants. Clients are very price sensitive when it comes to meat products and local products need to be reasonably/competitively priced with meat products from Winnipeg and Southern Ontario.

Table 34: Amount of beef products procured by food distributors

Beef	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground beef	4,545	0	4,545	kgs
Roast beef - inside round	5,900	0	5,900	kgs
Roast beef - outside flat	900	0	900	kgs

With respect to packaging preferences, the following specifications/units were most commonly identified:

- Ground beef – from federal/provincial inspected plant: no unit specified
- Roast beef cuts – from federal/provincial inspected plant, AAA, AA grade: 27kg boxes

PROCUREMENT / USE OF FLOUR

With respect to the annual procurement of flour products, 53,000kgs of all purpose and whole wheat flours are being sourced annually and all of this quantity is coming from outside the area (Table 35). It was noted that local flour products need to be reasonably/competitively priced with products from Winnipeg and Southern Ontario. In general, the greatest demand is for flour in 10kg or 20kg bags.

Table 35: Amount of flour products procured by food distributors

Flour	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Flour - all purpose and whole wheat	53,000	0	53,000	kgs

CONCLUSIONS

This is a sector where reliability and on time delivery is more important than in virtually all other sectors. Customers need their products supplied in a predictable manner: on time, of excellent quality and at competitive processes. In a number of cases we heard of retailers experimenting with local product but finding that delivery, quantity and quality was not dependable. They then switched to a more reliable non-local supplier or product.

It is also a sector where seasonality is a significant factor. Some combination of local and imported product might be required.

3.1.4 FOOD RETAILERS

INTRODUCTION

Food retailers (e.g. specialty grocery stores, full service grocery stores, etc.) typically carry a broad inventory of food items and routinely work with food distributors/wholesalers to ensure they can predictably maintain a consistent volume/variety of quality food items on their shelves.

A total of 13 businesses from the local food retail sector were interviewed as part of Thunder Bay and Area Food and Market Study. The majority of these operations (10) are independent businesses and a small number are part of national chain operations. The businesses represent a broad cross section of newer/older and larger/smaller establishments. Most of the businesses have been in operation for more than 20 years while a small number have been in operation for less than five years. A small number of businesses employ 5 or less individuals but most employ 10 or more individuals and collectively the businesses have over 400 employees (full-time, part-time and seasonal combined).

Eleven of the 13 businesses reported that they currently buy some amount of food grown / harvested within 100km of Thunder Bay (or food products made with ingredients grown within 100km of Thunder Bay) and two of these businesses acknowledged that what they are sourcing is in very small amounts. Several of the businesses emphasized that they procure a substantial amount of food from regional sources (e.g. southern Ontario, Manitoba).

Approximately 73% of the businesses reported that a key motivation for buying locally grown/harvested food items is that it benefits the local economy. Other key motivators for buying local include customers' interest in / demand for local food (46%), and using local foods as a marketing tool (18%) (Table 36).

Table 36: Motivation of businesses for buying local (n=11)

Motivation for buying local	Number	Percent
Contributes to the local economy	8	72.7%
Customers interested / demand local food	5	45.5%
Using local foods as a marketing tool	3	27.3%
Local is fresher	2	18.2%

Respondents were allowed to identify more than one motivator.

With respect to the factors that dissuade businesses from buying locally grown/harvested food items, the most common concerns identified include insufficient overall volume of product, consistency in availability and/or seasonality, limited selection of locally produced products, and limited or no information on where / what local supply is available (Table 37).

Table 37: Motivation of businesses for not buying local (n=10)

Motivation for not buying local	Number	Percent
Insufficient volume of product	4	40.0%
Consistency in availability and/or seasonality concerns	3	30.0%
Farmers are not producing the food items they want / limited selection	3	30.0%
Limited or no information on where / what local supply is available	3	30.0%
High cost concerns	2	20.0%
Limited by headquarter / franchise policies	2	20.0%
Delivery / accessibility challenges	1	10.0%

Respondents were allowed to identify more than one factor.

Respondents were asked if they would consider purchasing a local product of higher quality at a higher cost than a non-local product of lesser quality. Of the seven businesses that responded to this question, all seven indicated that they would and two businesses provided the qualification that the local items would likely need to be priced comparably to non-local food to maximize consumer interest.

Businesses were asked to identify the key characteristics they think of when looking for 'higher quality' food items. The most common features identified include freshness, flavourful and/or appealing appearance, and a high quality / standard.

All of the businesses generally feel that featuring locally grown/harvested food items adds value to their operation. Several businesses noted that customers specifically come to their store to access locally grown / produced food and that local foods are the main attraction at their store. Several businesses emphasized that not all customers are equally interested in local foods and some customers are much more sensitive to pricing than others and they will not or cannot pay a premium price for local.

Businesses were asked to share their views on what would make it easier for them to purchase local food. The most common factor identified is to have access to consistent volumes of food items throughout the year (30%), offer local foods at a price that is reasonably comparable to non-local foods (30%), and improve information on where / what local food supply is available (30%) (Table 38).

Table 38: What would make it easier for your business to purchase local food? (n=10)

Factors	Number	Percent
Consistency of food volume / availability	3	30.0%
Reasonably / competitively priced foods	3	30.0%
Information on where / what local supply is available	3	30.0%
Consistency of food quality / standards	2	20.0%
Improved delivery / access mechanism (e.g. direct delivery, centralized location)	2	20.0%
Greater variety / selection of locally produced items	2	20.0%
Maintaining supply out of season	1	10.0%

Respondents were allowed to identify more than one factor.

CURRENT PROCUREMENT OF LOCAL / NON-LOCAL FOOD ITEMS

Businesses were invited to share details on the amounts of food items they procure/source for their operations on an annual basis. Only a small number of the retail businesses were able to provide data and those that did focused on a few select items. The following sections provide a breakdown of these characteristics by food groups (e.g. vegetables, proteins/meat, flours and baked goods) and additional details are provided for select food items where considerable quantities are identified. All of the amounts (weights, volume, units) presented in the following sections are taken directly from the businesses that were surveyed as part of this study.

PROCUREMENT / USE OF VEGETABLES

With respect to the annual procurement of vegetables, fresh potatoes represent the single largest vegetable commodity by weight with over 38,600kgs being sourced annually of which 32,800kgs are sourced from local producers and almost 5,800kgs are sourced from outside the area (Table 39). Other vegetables such as tomatoes, carrots and onions are being sourced in much smaller quantities (400-600kgs annually) and much of this product is coming from local producers. Businesses want local vegetables to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer. However, one business noted that some of their clients will pay 5-10% more for local tomatoes. One business noted that he has supported local growers for a number of years and he observed that is becoming increasingly challenging to source his needs from local growers as they are trying to supply more businesses and keep 'everyone happy' but ultimately the production is not keeping pace with overall demand. The businesses did not go into detail on their preferences for packaging units for vegetables.

Table 39: Amount of vegetables procured by food retailers

Vegetables	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Potatoes	38,636	32,841	5,795	kgs
Carrots	418	300	118	kgs
Onions	591	295	295	kgs
Tomatoes	480	480	0	kgs
Beets	182	182	0	kgs

PROCUREMENT / USE OF PROTEINS

With respect to the annual procurement of pork products, over 13,000kgs of various pork cuts (loin, rib, butts, bacon, etc.) are being sourced annually and all of this quantity is coming from outside the area (Table 40). Additionally, almost 26,000kgs of sausage (pork and Italian combined) are being sourced annually and all of this quantity is coming from outside the area. Businesses want the meat cuts and processed meats to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer and they do not want whole or half animals.

With respect to the annual procurement of beef products, over 4,900kgs of beef prime rib and tenderloin are being sourced annually and all of this quantity is coming from outside the area. Businesses want the meat cuts to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer and they do not want whole or half animals.

With respect to the annual procurement of eggs, over 39,000 dozen whole shell eggs are being sourced annually and all of this quantity is coming from outside the area. Businesses want eggs to be reasonably/competitively priced with what the large volume distributors/wholesalers can offer.

Table 40: Amount of protein products procured by food retailers

Protein	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Ground beef	123	123	0	kgs
Roast beef	123	123	0	kgs
Beef prime rib	4,538	0	4,538	kgs
Beef tenderloin	414	0	414	kgs
Pork loin	780	0	780	kgs
Pork rib	2,106	0	2,106	kgs
Pork butts	1,064	0	1,064	kgs
Pork sausage	23,630	0	23,630	kgs
Italian sausage	2,360	0	2,360	kgs
Other pork items – ribs, bacon	9,455	0	9,455	kgs
Chicken - whole	196	0	196	kgs
Eggs whole shell	39,060	0	39,060	dozen

The businesses did not go into detail on their preferences for packaging units for proteins.

PROCUREMENT / USE OF FLOUR AND BAKED GOODS

With respect to the annual procurement of flour products, a total of 3,900kgs of various flour products are being sourced annually of which 1,170kgs are sourced from local producers and 2,370kgs are sourced from outside the area (Table 41). Businesses want the local flour products to be reasonably/competitively priced with non-local products and there is also interest in accessing a greater variety of local flour products. The businesses did not go into detail on their preferences for packaging units for flour products.

Table 41: Amount of flour products used by food retailers

Flour	Total annual amount used	Amount sourced locally	Amount sourced outside Thunder Bay area	Weight / volume
Flour – combination of sifted, whole wheat, rye, etc.	3,900	1,170	2,730	kgs

CONCLUSIONS

Given the high volume of food items sold through the retail sector this is an area of significant growth potential for local foods. However, the challenges of providing reliable and more substantial quantities of local food will need to be addressed by local producers to promote expansion in this sector. On the retailer side, business bureaucracy often serves to complicate/limit local food expansion opportunities (especially in the case of the corporate purchasing policies of franchises) and more flexible policies need to be adopted.

3.1.5 FOOD PROGRAMS

INTRODUCTION

These are important community programs designed, generally to meet the needs of residents who find themselves short of food on a weekly or occasional basis. These organizations can source any variety of local product provided it is free or at a reasonable price and of sufficient quality to meet the needs of their clients.

A total of five organizations from the food program sector were interviewed as part of Thunder Bay and Area Food and Market Study. These are not for profit organizations that offer food distribution and/or preparation services for segments of the community (e.g. low income families, seniors, children/students). The organizations typically rely on food donations in large part or a combination of food purchases and food donations. Some of the organizations have been active in the community for more than 20 years and others for less than 10 years.

Four of the organizations are currently receiving / procuring locally grown / harvested foods within 100km of Thunder Bay (or food products made with ingredients grown within 100km of Thunder Bay). It was generally noted that the amount of local food items being received / procured is very small and is typically acquired through a range of sources including local farms, processors, distributors, and retailers. In some instances, local food is being provided by local community gardens and individual gardens.

Three of the organizations reported that a key motivation for sourcing locally grown / harvested foods is to provide their clients with fresh food options which they believe to be a healthier option compared to processed foods. Two of the organizations also reported that a key motivation for sourcing locally grown / harvested foods is to support local farmers. Another organization noted that their staff and volunteers are personally interested in promoting local food and do all they can to include local food options as part of the service they provide.

Two of the organizations noted that they can accept a certain amount of ‘seconds’ or blemished vegetables as these ingredients can be processed into other food products (e.g. soups) that they can offer as part of their food service.

The biggest limitation faced by these organizations is that they have very limited funds for procuring local food and local sources are only providing a small amount of their total food needs and so there is a heavy reliance on non-local food items. Several of the organizations noted that locally grown food items are higher priced than foods grown elsewhere which creates reliance on donations when it comes to accessing locally grown food items.

Another challenging factor is that some organizations have very limited cold storage / transportation resources which limits their ability to store perishable food items and to distribute these items to distant / remote communities outside the City of Thunder Bay. This forces some organizations to focus on processed food options for some destinations to ensure food is not wasted from spoilage.

The organizations were asked to share their views on what would make it easier for them to access / procure local food. The most common factors identified include accessing locally grown foods that are reasonably or discount priced and accessing a larger volume of locally grown foods. As noted by one organization, their budget is fixed and there is no opportunity to pass on costs to their customers. Another organization emphasized the importance of accessing the same fresh food options that shoppers experience when they shop at the Country Market.

CURRENT PROCUREMENT OF LOCAL / NON-LOCAL FOOD ITEMS

As noted above, these organizations are not currently procuring locally grown / harvested products in substantial quantities but some organizations are actively pursuing initiatives that will potentially lead to increased procurement of locally grown / harvested foods in their operations.

One organization is working toward establishing a social enterprise that will include a test kitchen and cold storage space and they will aim to produce value added products (sliced, diced, pureed, frozen, boxed, bagged) for the prepared food sector (businesses and institutions). Some of the initial products to be explored include potatoes, tomatoes and carrots. It was noted that these products will need to be procured at a competitive price to ensure that the enterprise covers its operation costs. It was further noted that because the enterprise is focusing on processing foods they will have a higher tolerance for blemished or imperfect / ugly vegetables.

Another organization is holding discussions with a local supplier to try and develop a delivery mechanism and schedule that suits the need of the organization and its client base. They are hopeful that the can stimulate enough demand through their client base to reach a volume that will enable / motivate the supplier to offer a discount on price. Products that have the greatest potential include carrots (need to be ready to eat baby carrots) and apples (need to be small sized apples ideally to reduce waste). There is also potential for eggs which they use as a protein item for the breakfast program. With respect to processed food items they see potential for locally made buns and wraps as well as muffins.

One organization noted that they have connections with vendors / farmers through the Country Market and noted that vendors / farmers are generous in donating food or providing a reduced price (e.g. local preserves, fresh produce, pasta). However, it is impossible to derive consistent volumes of food items through this process. They also noted that their needs can vary from week to week as they change their menu planning for their families and this complicates how they go about sourcing their food items.

CONCLUSIONS

Local food programs are unique in that they normally have a social purpose: the procurement of food for those who cannot afford to purchase all they need in a standard retail store. These programs are interested in sourcing local food but other factors (e.g. price, storage space / facilities, needs of local clients) are typically higher level considerations that they have to address.

3.1.6 SUMMARY OF FOOD DEMAND - LOCAL BUSINESSES / ORGANIZATIONS

A large majority (84%) of the 103 businesses/organizations that participated in this study reported that a portion of the food products they use in their operations are sourced locally (within 100km of Thunder Bay).

One of the strongest motivations that businesses/organizations attach to procuring locally grown/harvested food products is that it benefits the local economy. Another key motivation is that many businesses/organizations feel that locally grown/harvested food products are fresher and higher quality than non-local. Most of the businesses that are procuring locally grown/harvested food products believe that it adds value to their operation.

Key factors that dissuade businesses/organizations from procuring locally grown/harvested food items include cost concerns (i.e. local is found to be / or viewed as being more expensive than non-local) and concerns about the availability of locally grown/harvested foods (overall volume and consistency of availability).

Most of the businesses reported that they would procure a locally grown/harvested product of higher quality at a higher cost compared to a non-local product of lower quality but in many cases this came with a qualifier that the local product could not be priced significantly higher than the non-local option and that food quality standards needed to be consistently maintained. The features that businesses/organizations most commonly associate with 'quality' food products include freshness and flavourful and/or appealing appearance.

It is important to note that some businesses have an expanded view of what they categorize as local content. In several instances, businesses emphasized that they have progressively worked to procure more Ontario and Canadian content.

Businesses/organizations identified a range of conditions that would facilitate easier access to food grown/harvested in the Thunder Bay area. The most common conditions include increasing the volume of local food produced and the consistency of production, improving the delivery / access mechanisms for procuring local foods, and ensuring that local foods are reasonably / competitively priced compared to non-local foods.

There is considerable variation in food procurement activity within and across the different sectors examined in this study. Some businesses are regularly procuring food products and the amounts aggregate into substantial volumes over the course of a year. In some cases these businesses focus on a narrow range of products (e.g. meat processing) and in other cases they handle a much wider variety of products (e.g. prepared food sector). Other businesses are small scale operations and their food procurement practices can fluctuate considerably.

The businesses/organizations interviewed for this study typically provided information on the food items that they use in substantial quantities and some businesses were not able to or opted not to share this information. As such, the data does not reflect a total inventory of food procurement / use by the businesses/organizations. However, it does provide a picture of local food demand, the extent to which local food products are meeting some of that demand, and an indication of the shortfall that local food industry stakeholders might want to try and reduce through local production and processing activities. The local food shortfall appears substantial in many commodity areas and there are generally growth opportunities across all of the food production sectors (e.g. vegetables, fruits/berries, meat proteins, dairy, grains and oilseeds).

3.2 PROFILE OF LOCAL FOOD CONSUMER HABITS / PREFERENCES / VALUES

3.2.1 COUNTRY MARKET CUSTOMERS

The following results are derived from the survey of Country Market customers. A total of 385 customers participated in the Thunder Bay and Area Food and Market Study (100 customers completed the survey on-site at the Country Market and 285 customers completed a web based version of the survey). Complete data tables from the survey are presented in Appendix D.

CHARACTERISTICS OF COUNTRY MARKET SURVEY RESPONDENTS

Of the 385 customers that completed the Country Market survey, females made up the large majority of the respondents (79%). Respondents ranged in age from 19 to over 60 years with majority of the respondents (60%) over the age of 39 years. More than half of the respondents (57%) have a university degree and the large majority (86%) have some form of post-secondary education. The large majority of respondents (82%) have been shopping at the Country Market for three or more years including a substantial segment (24%) that have been shopping at the Country Market for 10 or more years. Approximately three quarters of the respondents shop at the Country Market at least once a month including a large segment (46%) that shop at the Country Market at least twice a month.

A large majority of the respondents (81%) reported that that they spent more than $20 on food items at their most recent visit to the Country Market and a substantial proportion (46%) reported that that they spent more than $40 on food items at their most recent visit to the Country Market.

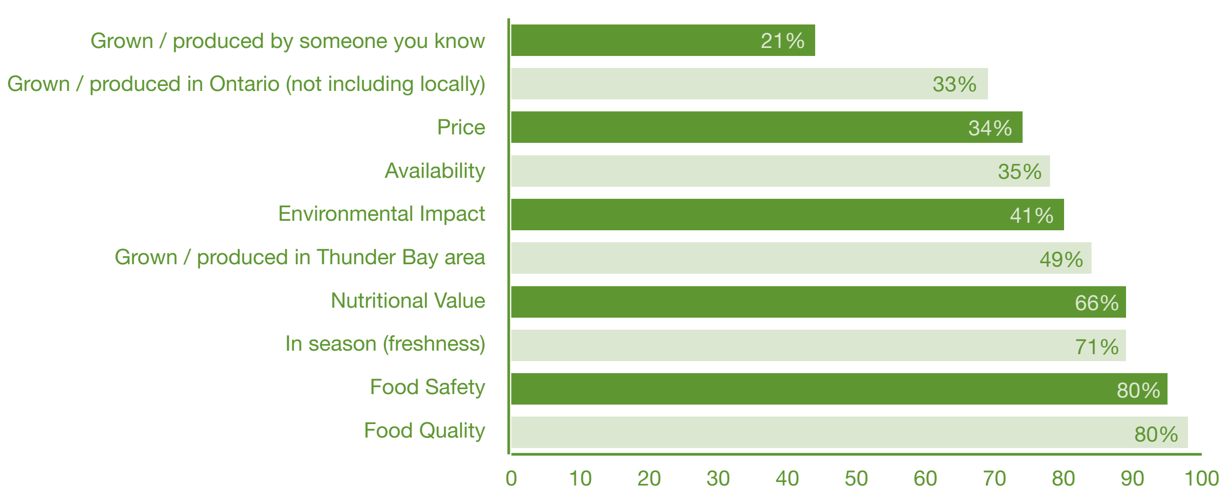
IMPORTANT FACTORS THAT COUNTRY MARKET CUSTOMERS CONSIDER WHEN BUYING FOOD

Two of the most common factors that Country Market customers view as important or very important in their food purchasing practices are food quality (98% of respondents) and food safety (95%). Over 80% of the respondents also view nutritional value and seasonal freshness as important or very important food purchasing considerations. A very large majority of the respondents (84%) reported that buying locally grown food in the Thunder Bay area (within 100km) is important or very important and 44% indicated that it's important or very important to know the farmer/producer. Almost 70% of the respondents indicated that buying food grown in Ontario (not including locally grown) is important or very important. Approximately three quarters of the respondents view food price as an important or very important food purchasing consideration (Figure 1).

A further analysis of the data revealed statistically significant differences between different groups of Country Market customers:

- Respondents aged 50 years of age and over were more likely to consider seasonal freshness ($p=0.023$), availability ($p<0.001$), and grown locally ($p=0.015$) as important compared to customers younger than 50 years of age.
- Respondents with primary/secondary/college education were more likely to rate nutritional value ($p=0.022$) and environmental impact ($p=0.033$) as important compared to university-educated customers.
- Respondents that spent more than $40 during their most recent visit to the market were more likely to rate environmental impact ($p=0.001$), grown locally ($p=0.039$) and "grown or produced by someone you know" ($p=0.001$) as important compared to those who spent less.

Figure 1: Factors that Country Market Customers view as Important or Very Important when Buying Food (n=385)



MOTIVATIONS FOR BUYING LOCALLY GROWN / HARVESTED FOODS

Country Market customers were asked to identify their key motivation(s) for buying locally grown / harvested foods. The most common motivation, as identified by 80% of the respondents, is to support the local economy by buying from local farmers / producers.

Other important motivations identified by the majority of respondents include the quality of local food (71%) and the freshness of in season local produce (66%).

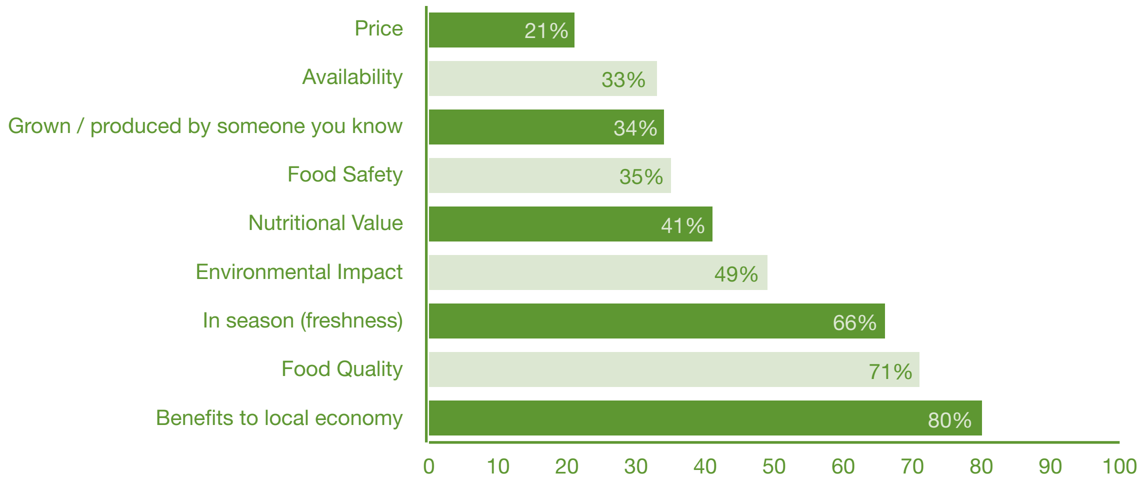
A third or more of the respondents also indicated that the nutritional value of local food, food safety, knowledge of local producers and the reduced environmental impact of local food were important motivators for buying locally grown.

Only 21% of the respondents reported that price was a key motivator in their decision to buy locally grown/ harvested foods (Figure 2).

A further analysis of the data revealed statistically significant differences between different groups of Country Market customers:

- Respondents aged 50 years and over were more likely to consider food safety ($p=0.003$), nutritional value ($p=0.028$), seasonality ($p=0.026$), and availability ($p=0.021$) to be key motivators for buying local food compared to customers younger than 50 years of age.
- Respondents with primary/secondary/college education were more likely to rate price ($p=0.018$) and availability ($p=0.001$) as key motivators compared to university-educated customers.
- Respondents that had spent more than $40 during their most recent visit to the market were more likely to rate nutritional value ($p=0.03$), environmental impact ($p<0.001$), seasonality ($p=0.007$), and 'grown by someone you know' ($p=0.002$) as key motivators compared to those who spent less.

Figure 2: Factors that Motivate Country Market Customers to Buy Local Food (n=385)



WILLINGNESS TO PAY FOR LOCALLY GROWN / HARVESTED FOODS

A large majority of the respondents (70%) reported that they are willing to pay more for locally grown / harvested foods relative to non-local while 29% reported that they are willing to pay the same price for local as they pay for non-local food. Less than 1% of the respondents reported that they want to pay less for locally grown/ harvested foods (relative to non-local food).

QUALITIES / BENEFITS THAT CUSTOMERS ASSOCIATE WITH THE COUNTRY MARKET

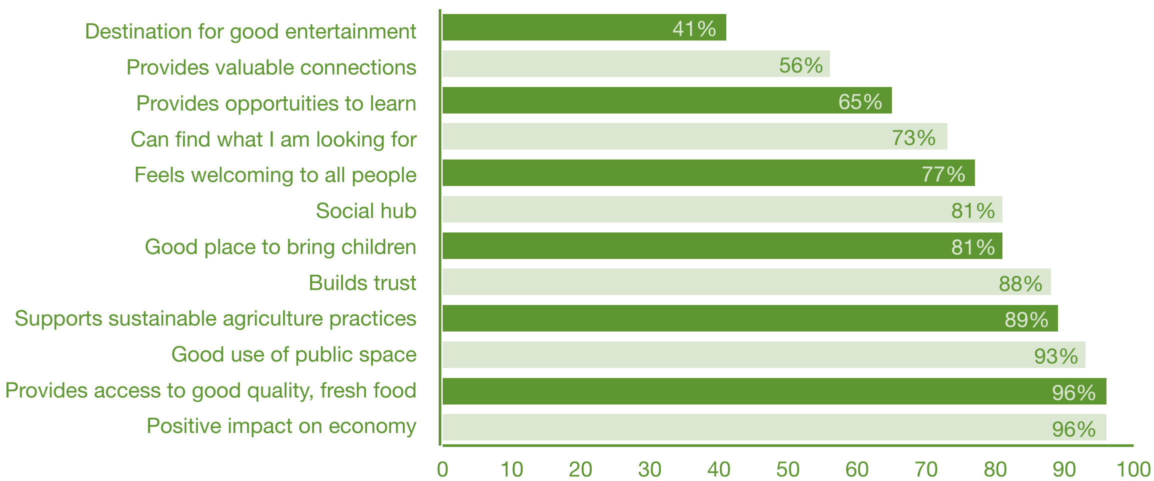
Customers associate a number of different qualities / benefits with the Country Market. Over 90% of the respondents believe that the market has a positive impact on the economy, provides access to good quality and fresh food, and is a good use of community space. Almost 90% of the respondents also believe that the market plays an important role in supporting sustainable agricultural practices (Figure 3).

A large majority of the respondents (over 75%) believe that the market serves an important social function in the community through its role as a social hub that brings a broad spectrum of community members together in a welcoming and child friendly environment that promotes trust building.

The large majority of respondents (70%) believe that the market offers a broad range of products that aligns with the things they are interested in and need and a substantial proportion of respondents believe the market provides valuable opportunities to learn more about where their food comes from (65%) and to make connections with others in the community (56%).

A further analysis of the data revealed statistically significant differences between different groups of customers. Respondents aged 50 years and over were more likely to agree[13] that the market feels welcoming to all people (p=0.007), that they can find what they are looking for (p=0.028), and that the market is a good destination for entertainment (p=0.03).

Figure 3: Qualities / Benefits that Customers Associate with the Country Market (n=385)



SUGGESTIONS FOR IMPROVING THE FOOD SHOPPING EXPERIENCE AT THE COUNTRY MARKET

Survey respondents were asked to share their thoughts on ways the market could improve the shopping experience for customers. Responses covered three general themes: improvements to the variety and amount of fresh food, improvements to accessibility, and provision of more information.

Respondents identified a number of different food items that they would like to see more of at the market. In particular, 27 respondents would like to see more fresh produce, along with greater variety in the produce offered (e.g. mushrooms, bell peppers, blueberries, beans – pinto, romano, great northern).Several respondents noted that some of the fresh produce vendors run out of products an hour or more before the market closes on Saturday which necessitates that they arrive early and that is not always an option when they have other commitments early in the day.

Respondents would also like to see more meat products including deli meat, wild meat (venison, buffalo, boar), and fish (14). There was also interest in having more local chicken meat at the market (22). Several respondents recommended that more dietary options (e.g. low carbs, vegan, vegetarian) need to be featured at the market (10).

13 Agreement scales were aggregated into three categories for this analysis: disagree (strongly disagree, disagree), neutral, and agree (agree, strongly disagree).

Other food suggestions include having more local honey, eggs, baked goods, beans, mushrooms, butter, yogurt, and ethnic/cultural foods at the market. There is also interest in seeing a greater indigenous food presence at the market (e.g. wild rice, dried fish, forest products).

Accessibility at the market was frequently mentioned as a challenge (30). Respondents noted the need for more space for venders, longer and better hours, and greater accessibility around and within the market building. Several respondents highlighted the need for handicap accessibility to the second floor of the building. Respondents also noted that there are tripping hazards around the market and a better layout is needed for people with visual impairments.

A small number of respondents reported that they would like to see more information provided / displayed at the market including vender farm management practices (including animal husbandry) and where venders sell their product outside the market and vender availability. Several respondents would like the market to offer educational workshops (e.g. cooking lessons, recipes) and there was also interest in a Food Box program based out of the market for customers who are unable to attend the market as often as they would like to. There is also interest in making the market more environmentally friendly (e.g. reducing / eliminating plastic bags and wasteful packaging materials at the market).

SUGGESTIONS FOR IMPROVING ACCESS TO LOCALLY GROWN / HARVESTED FOOD

Survey respondents were asked to share their views / thoughts on measures that could be taken to improve access to locally grown / harvested food in the community.

Approximately 44% of the respondents reported that accessibility to local foods (produced in Thunder Bay) needs to be improved in the City of Thunder Bay. In general, ‘improved accessibility’ includes having local food available at places / locations throughout the city (e.g. independent grocery stores, chain supermarket stores, convenience stores). Many of the respondents would like to see supermarkets carrying more local food options and positioning local foods dedicated areas of the store with increased visibility/advertising. With respect to the Country Market, respondents suggested that accessibility could be improved by expanding market hours on Wednesday and Saturday, experimenting with a third market day, and expanding/improving the parking space.

Approximately 17% of the respondents noted that food prices can restrict their access to local food. Several respondents noted that they are prepared to pay a little more for locally grown but the price cannot be substantially more (e.g. twice the price) than what the food item costs in other food outlets.

VIEWS ON THE COUNTRY MARKET AS A COMMUNITY HUB

Respondents broadly recognize the Country Market as an important community hub and they engage with the market in a variety of ways.

Many of the respondents reported that they like to talk to people, whether it be strangers, acquaintances, friends, or vendors. Furthermore, respondents appreciate learning about venders’ experiences in growing / making a product. As noted by one respondent, “you get a social experience at the market, whether you're talking to vendors, other customers about their shopping experience, or just by running into people you know unexpectedly.”

Several respondents commented on the social atmosphere and sense of community at the market. As noted by one respondent, “the market is a social hub and a place to see and interact with people you might not have close friendships with but provides valuable connections to meet and talk to acquaintances and social network.” Another respondent commented that “after a while you get to know the vendors and everyone feels like family. The kindness and sense of community I have experienced is amazing.” This view was echoed by another respondent who noted that the market “is a great gathering place to get to know vendors and connect with people in our community.”

Many of the respondents appreciate the openness of the venders. As commented by one respondent, “I love being able to ask questions about a product - you just can't do that at the big box stores.” Respondents talked about the value they hold in developing relationships with venders with one respondent reporting that “I have gotten to know a lot of the vendors over the years and truly enjoy chatting with them when I stop by… I am always more inclined to shop with vendors who make an effort to chat about their services/products and or just engage in general conversation.” Another respondent reported that “I love that the vendors recognize me...they pay attention and sometimes anticipate my needs.”

Some respondents have mixed feelings about the market as a community hub – in part because the market can be a crowded place at times. As noted by one respondent, “I've had very positive experiences at the market and some not so much. I find it difficult to bring my children because it is very crowded and busy due to short hours.” Another respondent explained that they “try to get in and out of the market in 5 minutes. I find it very hard with children, and it’s not a convenient place for child strollers.” This respondent went on to explain that they “love that the market is busy, but it’s hard to feel welcome when you have young children.” Another respondent noted that the crowds at the market are good from the standpoint of supporting the vendors but because of the busyness of the market, it's often difficult to have an actual conversation and learn from specific vendors about their products.” One respondent noted that “as the market gains popularity, it will have to move to a bigger space. It has outgrown the current location.”

Some respondents noted that more needs to be done to make the market more accessible to everyone. One respondent questioned whether the market was very accessible for low income families in the community and noted that “it’s is a great market and a great start to a community hub.” Several respondents highlighted the need for improving the physical accessibility of the market by making all areas wheelchair accessible and improving the layout and walkways for crowds and families with children.

Several respondents mentioned need to reach out to the wider community. As noted by one respondent, “it’s important for the market to reach out to people who presently do not shop there - people who think the food is too expensive or don't understand the need to support local initiatives. There are a lot of these people out there, and word of mouth doesn't seem to be enough to bring them to the market.” In general, respondents highlighted the need for more community outreach to promote awareness of the market, for example, through community newsletters or community organizations.

Many of the respondents expressed their gratitude for the market and words of encouragement for the market to continue with the good service that it provides.

3.2.2 GROCERY STORE CUSTOMERS

The following results are derived from the survey of grocery store customers. A total of 178 customers participated in the Thunder Bay and Area Food and Market Study (100 customers completed the survey on-site at three different stores and 78 customers completed a web based version of the survey). Complete data tables from the survey are presented in Appendix E.

CHARACTERISTICS OF GROCERY STORE SURVEY RESPONDENTS

Of the 178 customers that completed the grocery store survey, females made up the large majority of the respondents (70%). Respondents ranged in age from 20 to over 60 years with majority of the respondents (61%) over the age of 49 years. Close to half of the respondents (47%) have a university degree and the large majority (77%) have some form of post-secondary education.

Approximately three quarters of the respondents reported that they make the majority of their food purchases at large chain supermarkets and one quarter make the majority of their food purchases at independent grocery stores. The large majority of respondents (87%) have been shopping at their grocery store for three or more years including a significant segment (64%) that have been shopping at their grocery store for 10 or more years. Approximately 95% of the respondents shop at their grocery store weekly.

A large majority of the respondents (85%) reported that that they spent more than $20 on food items at their most recent visit to the grocery store and a substantial proportion (59%) reported that that they spent more than $40 on food items at their most recent visit to the grocery store.

IMPORTANT FACTORS THAT GROCERY STORE CUSTOMERS CONSIDER WHEN BUYING FOOD

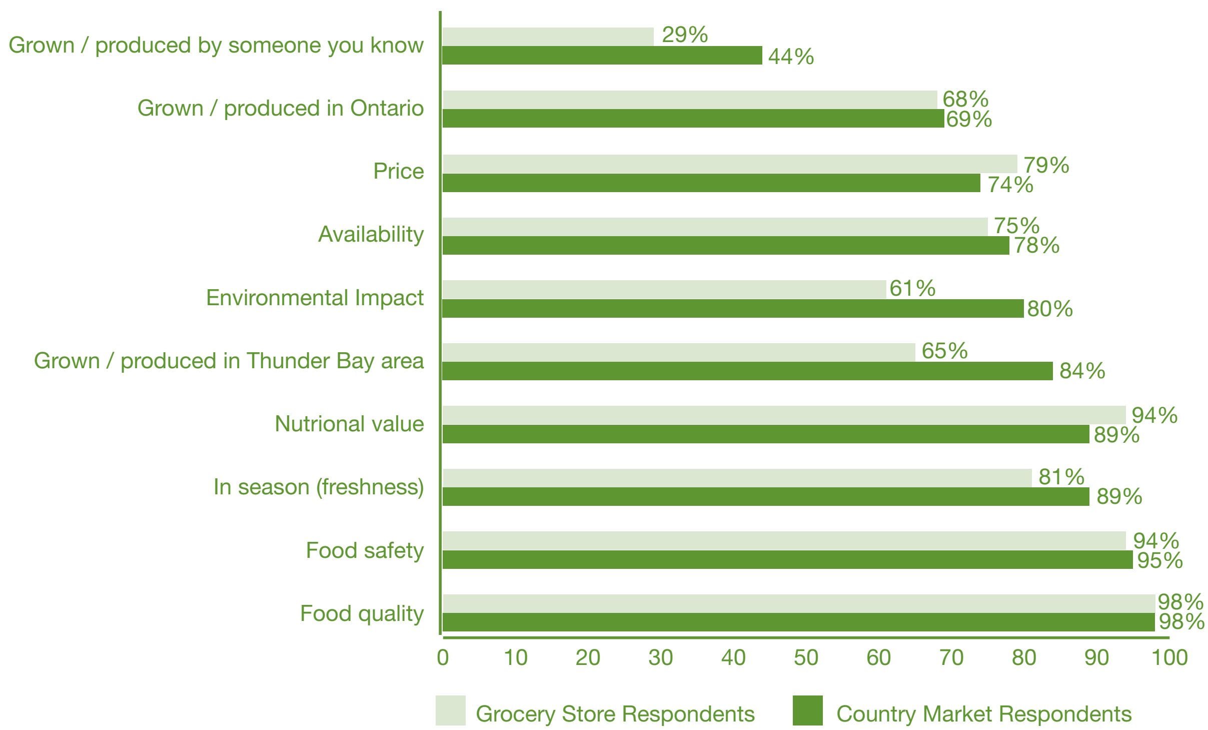
Two of the most common factors that grocery store customers view as important or very important in their food purchasing practices are food quality (98% of respondents) and food safety (94%). This closely mirrors the findings from the County Market survey. Over 80% of the grocery store respondents also view nutritional value and seasonal freshness as important or very important food purchasing considerations and over 70% of the respondents view availability and price as important or very important food purchasing considerations (Figure 4).

The analysis reveals that an almost equal proportion of grocery store respondents (68%) and Country Market respondents (69%) feel that buying food grown in Ontario (not including locally grown) is important or very important, However, a higher proportion of Country Market respondents (84%) feel that buying locally grown food in the Thunder Bay area (within 100km) is important or very important compared to grocery store respondents (65%). A higher proportion of Country Market respondents also feel that environmental impacts (80%) and knowing the farmer/producer (44%) are important or very important compared to grocery store respondents (61% and 29%).

A further analysis of the data revealed statistically significant differences between different groups of grocery store customers:

- Respondents aged 50 years of age and over were more likely to consider seasonal freshness (p=0.024) and availability (p=0.015) as important compared to customers younger than 50 years of age.
- Respondents with primary/secondary/college education were more likely to rate “grown or produced by someone you know” as important (p=0.034) compared to university-educated customers.
- Respondents that spent more than $40 during their most recent visit to the grocery store were more likely to rate environmental impact (p=0.013), availability (p=0.042), and “grown or produced by someone you know” (p=0.04) as important compared to those who spent less.

Figure 4: Factors that Grocery Store Customers (n=178) and Country Market Customers (n=385) view as Important or Very Important when Buying Food



MOTIVATIONS FOR BUYING LOCALLY GROWN / HARVESTED FOODS

Over 80% of the grocery store respondents reported that they sometimes purchase food that has been grown / harvested within 100km of Thunder Bay.[14] These respondents were asked to identify their key motivation(s) for buying locally grown / harvested foods. The most common motivation, as identified by 61% of the respondents, is to support the local economy.

Another important motivation identified by over half of respondents is the freshness of in season local produce (59%).

Country Market Customers and grocery store customers reported on the same types of motivators but the proportion of Country Market respondents was consistently higher than the grocery store respondents. For example, a higher proportion of Country Market respondents identified food quality (71%), nutritional value (41%) and food safety (35%) as important or very important motivators for buying local food compared to grocery store respondents (46%, 41%, and 23%) (Figure 5).

Figure 5: Factors that Motivate Grocery Store Customers (n-178) and Country Market Customers (n=385) to Buy Local Food

A further analysis of the data revealed statistically significant differences between different groups of grocery store customers:

- Respondents under 50 years of age were more likely to consider nutritional value (p=0.034) as an important motivator compared to customers 50 and over.
- Respondents with primary/secondary/college education were more likely to rate local food availability (p=0.044) as an important motivator compared to university educated customers.
- Respondents that spent more than $40 during their most recent visit to the grocery store were more likely to rate food quality (p=0.022) and environmental impact (p=0.037) as key motivators (p=0.037) compared to those that spent less.

14 The most common reasons given for not purchasing locally grown / harvested foods include the following:
- Local food is more expensive (10 respondents)
- Local food is not convenient to access (10 respondents)
- Local food is not always available – out of season (6 respondents)
- Unfamiliarity with where to find local food (3 respondents)

WILLINGNESS TO PAY FOR LOCALLY GROWN / HARVESTED FOODS

A small majority of the grocery store respondents (60%) reported that they are willing to pay more for locally grown / harvested foods relative to non-local while 39% reported that they are willing to pay the same price for local as they pay for non-local food. Approximately 1% of the respondents reported that they want to pay less for locally grown / harvested foods (relative to non-local food).

SUGGESTIONS FOR IMPROVING THE FOOD SHOPPING EXPERIENCE AT THE GROCERY STORE

Survey respondents were asked to share their thoughts on ways their grocery store could improve the shopping experience for customers. Responses covered three general themes: improvements to the variety and amount of fresh food, improvements to accessibility, and provision of more information.

Respondents reported that they wanted to see more selection and/or availability of the following food products/ items at the grocery store: strawberries, beans, tomatoes, potatoes, flour, baked goods, dairy and dairy substitutes. There is also interest in seeing more organic options and vegan ready cooked products.

Respondents suggested that more could be done to promote / advertise the availability of in season produce including better signage and food labelling and strategic item placement in the store.

SUGGESTIONS FOR IMPROVING ACCESS TO LOCALLY GROWN / HARVESTED FOOD

Survey respondents were asked to share their views / thoughts on measures that could be taken to improve access to locally grown / harvested food in the community. Many of the respondents suggested that the grocery stores in general (large and smaller scale) need to continue to provide space for locally grown foods and to adequately promote their local options – in store and through their general promotional activities in the community. Respondents also reported a desire for greater transparency in terms of identifying/promoting the specific producers and their production practices.

With respect to accessing local food at other venues, several respondents suggested that the current location of the Country Market is not convenient and the days/hours of operation are too limited. Several respondents further commented that they felt the Country Market is too crowded and not an ideal place to bring children. A small number of respondents suggested that the City should allow for and promote mobile/pop-up markets around the area.

A few respondents specifically noted that price was a key consideration in their ability to access locally grown foods and that some items were not the affordable option (i.e. not competitively priced compared to non-local options).

3.2.3 COUNTRY MARKET VENDORS

Vendors shared their views on the key features that attract customers to the Country Market. Beyond the key attraction of fresh, local food items, vendors believe that customers value the relationship that they develop and maintain with vendors at the Country Market. Vendors commented that customers are interested in knowing the "story" behind the food products they purchase in terms of how food items are produced / harvested. The information that vendors provide reinforces the trust that customers have in the vendor and their products. These observations are consistent with the observations provided by the customers through the County Market survey and confirm that many customers strongly value the opportunity to meet with and develop relationships with local producers.

Vendors noted that relationship building is also important from the standpoint of educating customers about local farming conditions (e.g. abnormal weather during the growing season) and how these conditions can sometimes impact the selection/availability that they encounter at the market which might be different from what they encounter in the grocery stores. Vendors acknowledged that more can be done to continue to educate customers about the differences between local and non-local products.

Vendors emphasized that the Country Market has a large number of loyal repeat customers and suggested that these customers typically spend more and are willing to pay more for products than customers who visit the market infrequently. Vendors are aware that some members of the community feel that food items at the market are overpriced but they believe that this is not an entirely accurate assessment of the market. Vendors emphasized that some products are competitively priced based on quality and that prices change from week to week. It was further emphasized that one of the key advantages of local food is its freshness and expanded shelf life which provides added value to the customer (e.g. local salad greens will last a couple weeks in the fridge).

Vendors noted that many market customers continue to be primarily interested in fresh, unprocessed foods and this was confirmed in the results from the Country Market customer survey. Vendors also reported that customers are interested in learning about options for preparing/cooking the foods they see at the market and they are also interested in learning more about the nutritional value of the food items at the market. Again, customers confirmed these types of interests in the survey.

Vendors spoke about the growing consumer interest in pre-cooked and ready to eat foods. The market currently features a number of different vendors that sell prepared / pre-cooked foods and it could purposefully encourage/invite more local entrepreneurs to pursue these types of opportunities as a strategy for expanding the use of local foods at the market. It was suggested that there are a number of Health Unit certified kitchens in the community that entrepreneurs could potentially access for preparing their products but more needs to be done to share this information and raise awareness about the availability of these spaces. It is important to monitor customer preferences at the market to ensure that the services / products remain relevant to the needs / interests of consumers and that opportunities are provided/encouraged for introducing new lines of services / products.

Vendors shared their views on the current capacity of the Country Market to grow. Vendors suggested that the Country Market has not reached its customer potential and believe that more can be done to bring/attract more community members to the market.

It was noted that every square foot of space in the building is presently being used (with a considerable portion of the upper floor occupied by arts/crafts). Several food vendors have stalls outside surrounding the building and it was reported that there are more farmers that would like space but there is no room.

The market building is owned by CLE and the CLE and Country Market worked together to institute some changes to the outdoor space in 2017 to allow more space for outdoor vendors and customers to move around. Vendors generally feel that the current location of the Country Market is fine but the parking area could be improved. The parking situation and concerns about overcrowding at the market were also raised by customers through the customer survey.

A significant challenge at the market is that the top floor of the building is not fully accessible to all customers (i.e. no wheelchair or ramp access). This was a key issue/concern raised by many of the customers through the customer survey.

Vendors also spoke about the considerable inconvenience that results from having to relocate the market for a week-long period once a year to accommodate the CLE Fair in August. Although this issue did not arise as a substantial concern in the customer survey findings, it is important to note that the item was not specifically addressed in the survey questionnaire and the scheduling of the survey did not coincide with the dates when the market was located at the alternate site and so this may not have been an item of high awareness/priority at the time.

With respect to operating days/hours, vendors noted that the Country Market was expanded to an additional day (Wednesdays) several years ago to improve customer access and in 2017 the Wednesday market day was expanded to year-round. Vendors noted that the Wednesday market is busiest around the early hours of opening and then slows down considerably in the later hours. The Country Market also established its first off-site market stall at the Thunder Bay Regional Health Services Centre in 2017.

While the above efforts are serving to enhance access to locally grown / harvested foods within the City of Thunder Bay, vendors recognize that more could be done to improve access to local food items in the surrounding communities and across northwestern Ontario (e.g. Longlac, Hornepayne, Terrace Bay, Marathon). One idea put forward is to examine the feasibility of establishing a mobile market using a refrigerated truck to service these communities.

With respect the broader food retail environment in the City of Thunder Bay, vendors acknowledge that grocery stores have much greater market reach than the Country Market and vendors feel that local production is only at the early stages of making a presence in grocery stores. Vendors believe there is significant potential for the growth of local food content in the retail sector but noted that there are challenges to be addressed including the need to meet certification criteria (where required by food distributors, retailers, etc.) and ensuring that local production can consistently satisfy the food volume and quality needs of these sectors.

3.2.4 SUMMARY OF CONSUMER VALUES / INTERESTS IN RELATION TO LOCAL FOOD

Findings from the customer surveys (Country Market and grocery stores) reveal that food quality and food safety considerations are the highest priority items that influence food purchasing practices. The findings also reveal that nutritional value and in season freshness rank high as important food purchasing considerations.

A high proportion of Country Market (84%) and grocery store customers (65%) reported that buying locally produced food items (produced within 100km of Thunder Bay) is important to them. All of the Country Market customers regularly buy locally produced food items as part of their market shopping experience and 80% of the grocery store customers reported that they sometimes buy locally produced food items as part of their food shopping experience. While food quality and in season freshness were identified by customers as important motivators for buying local, the leading stimulus that customers identified is that it benefits that local economy.

A substantial majority of Country Market customers (70%) and grocery store customers (60%) reported that they are willing to pay more for locally grown / harvested foods relative to non-local while most of the remaining customers reported that they are willing to pay the same price for local as they pay for non-local food. It is important to note that the research did not attempt to quantify how much more customers are willing to pay for local food items but some customers clearly identified that prices for locally produced food items should not be priced substantially higher than comparable non-local items.

Food pricing was identified by some customers as a key factor that can limit their access to local foods (i.e. some locally produced foods are not competitively priced compared to non-local options). However, a more commonly identified factor is that locally produced foods are not broadly available in locations outside the Country Market (e.g. grocery stores, supermarket stores, convenience stores, etc.) and more needs to be done to expand the presence of local foods in these outlets and other innovative approaches (e.g. pop-up markets, mobile markets). This clearly speaks to another value that consumers associate with their shopping practices in general and that's the convenience factor.[15]

Within the Country Market setting itself, customers identified a number of ways that the shopping experience could be improved including expanding the selection and amount of fresh local food available, improving physical accessibility within the building, and providing more information (e.g. farm management practices, where venders sell their product outside the market, educational workshops - cooking lessons, recipes, etc.).

15 Efforts to expand access to locally grown fruits and vegetables could ultimately contribute to improving consumption rates in the Thunder Bay area where the overall consumption rate of five or more times per day for the population aged 12 and over is lower than the provincial average (e.g. in 2013-14, approximately 33.8% of the Thunder Bay population consumed fruits / vegetables five or more times per day compared to the provincial rate of 38.9%). Source: Public Health Ontario (2016) Snapshots: Thunder Bay District Health Unit & ON: Self-reported consumption of vegetables and fruit five or more times per day– overall crude rate, gender specific rates and age-specific rates 2009-2014. Toronto, ON: Ontario Agency for Health Protection and Promotion. Accessed June 2017 from:

- https://www.publichealthontario.ca/en/DataAndAnalytics/Snapshots/Pages/Health-Behaviours---Nutrition-and-Healthy-Weights.aspx

3.3 FARM PRODUCTION CHARACTERISTICS FOR THE THUNDER BAY AREA

Climate conditions coupled with soil conditions play a significant role in determining the

type of agricultural activity in the Thunder Bay area. At present, the area typically experiences fewer than 100 frost free days but climate change is expected to expand the number of frost free days in northern Ontario by 30-45 days by mid-century.[16]

Agricultural activity in Thunder Bay District is concentrated in the southern portion of the

District which features soils that are fair to moderately high in productivity with some

limitations on the range of crops that can be grown. With good soil and crop

management practices a variety of field crops can be grown in the District such as barley, wheat, oats, corn, soybeans, potatoes, alfalfa, and other hay crops. Local soil and climate conditions also allow for a variety of vegetable production and some limited fruit production.

Thunder Bay District experienced an overall drop in farm numbers over the period 2006 to 2016. As of 2016, the District reported a total of 202 farms, down from 239 farms in 2011 and 252 farms in 2006.[17]

Farms operating on 240 acres or more account for almost 38% of the total farms in Thunder Bay District with 23% of the farms operating on 400 acres or more. Smaller farms with less than 70 acres account for almost 32% of the farms in Thunder Bay District with 9% of the farms operating on less than 10 acres. The proportion of small, medium and large acreage farms in Thunder Bay District has not changed drastically over the period 2006 to 2016.

Table 43: Number of Farms in Thunder Bay District by Farm Size, 2006-2016

Farm size	2006		2011		2016	
	#	%	#	%	#	%
Under 10 acres	16	6.3%	21	8.8%	18	8.9%
10 to 69 acres	51	20.2%	50	20.9%	46	22.8%
70 to 129 acres	38	15.1%	32	13.4%	28	13.9%
130 to 179 acres	35	13.9%	23	9.6%	19	9.4%
180 to 239 acres	15	6.0%	25	10.5%	15	7.4%
240 to 399 acres	45	17.9%	34	14.2%	29	14.4%
400 or more acres	52	20.6%	54	22.6%	47	23.3%
Total farms	**252**	**100.0%**	**239**	**100.0%**	**202**	**100.0%**

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

Thunder Bay District experienced an overall decline in farmland area over the period 2006 to 2016.[18] The number

16 Qian, B., Hayhoe, H. and Gameda, S. Developing Daily Climate Scenarios for Agricultural Impact Studies. Presented at the 16th Conference on Climate Variability and Change, January 9, 2005. San Diego, CA.

17 In 2016, a census farm was defined as an agricultural operation that produces at least one of the following products intended for sale: crops (hay, field crops, tree fruits or nuts, berries or grapes, vegetables, seed); livestock (cattle, pigs, sheep, horses, game animals, other livestock); poultry (hens, chickens, turkeys, chicks, game birds, other poultry); animal products (milk or cream, eggs, wool, furs, meat); or other agricultural products (Christmas trees, greenhouse or nursery products, mushrooms, sod, honey, maple syrup products). Statistics Canada.

18 The changes in farmland area do not necessarily mean that the land has undergone conversion to other uses, only that it is no longer part of an operating census farm as defined by Statistics Canada. In Thunder Bay District, it appears that much of the change is associated with land becoming idle and reverting to natural growth. Some of the land may have been removed from farming for conservation or reforestation purposes and in some cases, the land may have been sold for other rural land uses or for development.

of farmland acres reported dropped from 61,850 in 2006 to 49,219 in 2016. The large majority of the decline occurred in land reported as land in crops or as other land (e.g. woodland, wetland, Christmas trees). Land in crops now account for just over half of the total farmland reported in Thunder Bay District while land in tame/seeded pasture and natural land for pasture account for 17% of the total farmland area.

The drop-off in reported farmland area in Thunder Bay District over the last ten years suggests that there are large areas of land that could potentially be reclaimed and/or more fully utilized for agricultural production. Indeed, historically the region has reported a larger area in agricultural production. The provincial soil survey from 1944 reported over 70,000 acres of land in the Thunder Bay area that were suitable for good agricultural production and over 100,000 acres of land that have potential for specialized farming activities (e.g. potato production, alfalfa production, livestock grazing) (Hills and Morwick, 1944).

Table 44: Farmland use in Thunder Bay District, 2006-2016

Farmland use (acres)	2006		2011		2016	
	#	%	#	%	#	%
Land in crops	29,420	47.6%	29,633	50.2%	25,255	51.3%
Summerfallow [a]	163	0.3%	257	0.4%	48	0.1%
Tame / seeded pasture [b]	3,364	5.4%	3,184	5.4%	3,085	6.3%
Natural land for pasture [c]	8,472	13.7%	6,454	10.9%	5,410	11.0%
Other land [d]	20,431	33.0%	19,514	33.0%	15,421	31.3%
Total area of farmland	**61,850**	**100.0%**	**59,072**	**100.0%**	**49,219**	**100.0%**

[a] Summerfallow involves keeping normally cultivated land free of vegetation throughout one growing season by cultivating (plowing, discing, etc.) and/or applying chemicals to destroy weeds, insects and soil-borne diseases and allow a buildup of soil moisture reserves for the next crop year.

[b] Tame or seeded pasture includes grazeable land that has been improved from its natural state by seeding, draining, irrigating, fertilizing or weed control. Does not include areas of land harvested for hay, silage, or seed.

[c] Natural land for pasture includes areas used for pasture that have not been cultivated and seeded, or drained, irrigated or fertilized. Includes native pasture/hay, rangeland, grazeable bush, etc.

[d] Includes woodland / wetland / Christmas trees.

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

There is an almost even balance of crop farms and livestock farms in Thunder Bay District based on how producers report the commodities where they derive the majority of their farm receipts. In 2016, 54% of farms in Thunder Bay District derived the majority of their farm revenue from crop production activities (i.e. field crops, greenhouse production) while 46% derived the majority of their farm revenue from livestock production (i.e. animal production including beef and dairy cattle, sheep and goats, hogs, other animals and poultry) In 2006, this was much closer to a 50/50 split. Sectors that experienced substantial farm number losses between 2006 and 2016 include beef cattle farming (-13 farms) and greenhouse, nursery and floriculture production (-11 farms).

Table 45: Farm Types in Thunder Bay District, 2006-2016

Farm type [a]	2006		2011		2016	
	#	%	#	%	#	%
Beef cattle ranching and farming	26	10.3%	19	7.9%	13	6.4%
Dairy cattle and milk production	32	12.7%	29	12.1%	27	13.4%
Hog and pig farming	0	0.0%	2	0.8%	4	2.0%
Poultry and egg production	5	2.0%	4	1.7%	7	3.5%
Sheep and goat farming	9	3.6%	7	2.9%	6	3.0%
Other animal production [b]	52	20.6%	41	17.2%	36	17.8%
Oilseed and grain farming	4	1.6%	6	2.5%	5	2.5%
Vegetable and melon farming	10	4.0%	12	5.0%	13	6.4%
Fruit and tree nut farming	9	3.6%	8	3.3%	4	2.0%
Greenhouse, nursery and floriculture	35	13.9%	25	10.5%	24	11.9%
Other crop farming [c]	70	27.8%	86	36.0%	63	31.2%
Total farms	**252**	**100.0%**	**239**	**100.0%**	**202**	**100.0%**

[a] Farm typing is a procedure that classifies each census farm according to the predominant type of production. This is done by estimating the potential receipts from the inventories of crops and livestock reported on the questionnaire and determining the product or group of products that make up the majority of the estimated receipts. For example, a census farm with total potential receipts of 60% from hogs, 20% from beef cattle and 20% from wheat, would be classified as a hog farm.

[b] Includes horses, bison, deer, elk, llamas, alpacas, wild boars, rabbits, bees, etc.

[c] Includes hay, fodder and other field crops excluding vegetables and fruit.

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

In 2016, farms in Thunder Bay District generated a total of $27.5 million in gross farm receipts. Dairy production accounted for 54% of the total farm receipts in 2016 while field crops including potatoes, soybeans and barley accounted for 6%, and vegetable and fruit crops accounted for 3% of the total farm receipts.

The agriculture sector in Thunder Bay District is characterized by a variety of small, medium and large farm operations based on gross farm income. In 2016, small farm operations generating less than $30,000 in total gross farm receipts accounted for almost 53% of all farms in the area, while farms generating $30,000 to $99,999 in receipts accounted for 22% of all farms and farms generating $100,000 or more in receipts accounted for 25% of all farms. Over the last ten years the proportion of small farms in the area has dropped while the proportion of larger farms has increased.

Table 46: Total Gross Farm Receipts for all Farms in Thunder Bay District, 2006-2016 [a]

2006		2011		2016	
# farms	$	# farms	$	# farms	$
252	$32,305,551	239	$32,396,811	202	$27,530,008

[a] Excluding sales of forest products.

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

Table 47: Farm Cash Receipts by Major Commodities for Thunder Bay District, 2011 and 2016

Farm commodity	2011	2016
Dairy	$13,700,000	$14,790,000
Floriculture and nursery	$6,250,000	$4,310,000
Other crops and livestock	$1,530,000	$3,070,000
Program payment [a]	$990,000	$1,310,000
Hay and clover	$420,000	$1,190,000
Potatoes	$1,070,000	$910,000
Fruit and vegetables	$970,000	$870,000
Soybeans	NA	$430,000
Barley	$210,000	$390,000
Calves and cattle	$1,360,000	$180,000
Sod	$270,000	NA

[a] Program payments are tied to agricultural production and paid directly from government to farmers. Examples of these payments include government income stabilization programs and non-private crop insurance payments.

N/A denotes that the commodity was not identified as a major commodity in the reference year.

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

Table 48: Number of Farms by Total Gross Farm Receipts for Thunder Bay District, 2006-2016

Farm receipts (excluding sales of forest products)	2006		2011		2016	
	#	%	#	%	#	%
Under $10,000	106	42.1%	105	43.9%	72	35.6%
$10,000 to $29,999	39	15.5%	52	21.8%	34	16.8%
$30,000 to $49,999	36	14.3%	25	10.5%	27	13.4%
$50,000 to $99,999	17	6.7%	11	4.6%	18	8.9%
$100,000 to $249,999	11	4.4%	9	3.8%	18	8.9%
$250,000 to $499,999	21	8.3%	15	6.3%	10	5.0%
$500,000 or more	22	8.7%	22	9.2%	23	11.4%
Total farms	**252**	**100.0%**	**239**	**100.0%**	**202**	**100.0%**

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

3.3.1 LIVESTOCK, POULTRY, HONEYBEES

Livestock inventories for beef cattle in Thunder Bay District declined substantially between 2006 and 2016 while inventories for dairy cows experienced a slight decline over the same period.[19] The number of pigs and sheep and lambs all increased substantially between 2006 and 2016 while the number of goats saw a 50% drop off over the same period. There was also a very significant decline in hen/chicken inventories[20] in the District between 2006 and 2016 and colonies of bees dropped by a third[21] during this period.

Table 49: Livestock, Poultry, Honeybee Inventories for Thunder Bay District, 2006-2016

Type of commodity	2006	2011	2016	Change between 2006 and 2016	
	# units	# units	# units	#	%
Total calves and cows	7,609	6,713	6,663	-946	-12%
Steers	310	181	141	-169	-55%
Beef cows	1,067	913	834	-233	-22%
Dairy cows	2,534	2,235	2,415	-119	-5%
Total pigs	206	461	566	360	175%
Total sheep and lambs	753	720	1,220	467	62%
Goats	273	243	137	-136	-50%
Total hens and chickens	33,901	NA	2,451	-31,450	-93%
Total turkeys	60	110	32	-28	-47%
Colonies of honeybees	168	167	113	-55	-33%

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

19 With respect to fluid milk production, dairy farms in Thunder Bay District produced a total of 21,299 kilolitres in 2016, up from 18,355 kilolitres in 2011 and 19,615 kilolitres in 2006 (Source: Dairy Farmers of Ontario).

20 The decline in hen/chicken inventories is in part linked to a local egg producer/distributor that ceased egg production activities while maintaining their egg distribution activities.

21 Although the census figures show a decline in bee colonies in the Thunder Bay area there has been recent growth and activity in the sector. There was a slump in colonies with the introduction of new pests and diseases into Northwestern Ontario such as varroa mite. However, local beekeepers have learned to deal with these new pests and the number of hives is increasing and there is an active beekeeper association Thunder Bay. It is also important to note that with the changes in local agriculture and the introduction of new crops, there seems to be an increase in the need for more bees to pollinate. Therefore, more hives seen across Northwestern Ontario. Source: Rob Rupert, OMAFRA Apiary Inspector. Oct. 13, 2017.

3.3.2 MAJOR FIELD CROPS

In the most recent census period (2016), barley was by the far the grain crop grown in the greatest acreage in the Thunder Bay District (excluding corn for silage) followed by soybeans, mixed grains and oats. It is difficult to attribute trends to the data without further local context as crops are rotated in and out of production from year to year. However, winter wheat acreage in the District over two most recent census periods was very minimal which could indicate a trend toward an alternative rotation crop. Additional information could also help in understanding if the decline in potato acreage in the District in 2016 (from 2006 and 2011) is an anomaly.

Table 50: Major Field Crops - Area in Production for Thunder Bay District, 2006-2016

Type of field crop [a]	2006	2011	2016	Change between 2006 and 2016	
	# acres	# acres	# acres	#	%
Winter wheat	593	60	0	-593	-100%
Oats for grain	434	444	127	-307	-71%
Barley for grain	3,886	4,478	3,532	-354	-9%
Mixed grain	161	0	255	94	58%
Corn for grain	NA	245	0	NA	NA
Corn for silage	NA	1,031	2,040	NA	NA
Hay	21,580	20,294	15,777	-5,803	-27%
Soybeans	296	680	475	179	60%
Potatoes	421	414	270	-151	-36%

[a] Crops to be harvested or used as green manure in the reference year.

N/A denotes that too few farms have reported data to ensure confidentiality. Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

3.3.3 MAJOR FIELD VEGETABLE CROPS

The data on field vegetable crops is limited in part because of the Statistics Canada protocol of supressing data when there are too few farms reporting in the reference area to ensure confidentiality. Based on the data available, we note that the reported acreage in pumpkins / squash in Thunder Bay District accounted for the greatest total acreage of field vegetables crops in 2016 followed by sweet corn and carrots. The reported area of production for other vegetable crops in the District in 2016 typically amounted to five acres or less. It is difficult to attribute trends to the data without additional information on the local context as some of the changes in acreage could be the result of year to year crop rotation practices.

Table 51: **Major Field Vegetable Crops - Area in Production for** Thunder Bay District, 2006-2016

Type of vegetable crop (excluding greenhouse vegetables)	2006	2011	2016	Change between 2006 and 2016	
	# acres	# acres	# acres	#	%
Sweet corn	23	24	15	-8	-35%
Tomatoes	2	3	4	2	100%
Green peas	4	7	5	1	25%
Green or wax beans	6	2	3	-3	-50%
Cabbage	1	0	4	3	300%
Carrots	6	3	14	8	133%
Rutabagas	1	11	NA	NA	NA
Beets	5	3	5	0	0%
Dry onions	1	1	4	3	300%
Lettuce	3	3	2	-1	-33%
Peppers	1	NA	NA	NA	NA
Pumpkins / squash	31	41	38	7	23%

N/A denotes that too few farms have reported data to ensure confidentiality.
Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

3.3.4 GREENHOUSE CROPS

The large majority of the area reported in greenhouse production in Thunder Bay District is dedicated to flower production. With respect to greenhouse vegetable production in the District, it appears that the reported area in production declined by 22% between 2006 and 2016.

Table 52: **Greenhouse Production - Area in Use for** Thunder Bay District, 2006-2016

Type of greenhouse crop (area in use)	2006	2011	2016	Change between 2006 and 2016	
	# sq ft	# sq ft	# sq ft	#	%
Flowers	272,408	NA	309,304	36,896	14%
Vegetables	32,408	NA	25,380	-7,028	-22%
Other production [a]	420,842	NA	117,834	-303,008	-72%

[a] Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 Census of Agriculture and are therefore not included. Prior censuses may have included their production in "other greenhouse products", affecting "total greenhouse area".

N/A denotes that too few farms have reported data to ensure confidentiality.
Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

3.3.5 MAJOR FRUIT AND BERRY CROPS

The data on field vegetable crops is limited in part because of the Statistics Canada protocol of supressing data when there are too few farms reporting in the reference area to ensure confidentiality. Based on the data available, we note that the reported acreage in applies in Thunder Bay District has declined consistently over the last ten years and it appears that the reported acreage of raspberries has also declined. Data for strawberry acreage is not available for 2016 but a significant decline in reported acreage occurred from 2006 to 2011.

Table 53: Major Fruit and Berry Production - Area in Production for Thunder Bay District, 2006-2016

Type of fruit / berry production	2006	2011	2016	Change between 2006 and 2016	
	# acres	# acres	# acres	#	%
Apples	12	9	4	-8	-67%
Strawberries	69	28	NA	NA	NA
Raspberries	9	6	5	-4	-44%

N/A denotes that too few farms have reported data to ensure confidentiality.
Source: Statistics Canada, Census of Agriculture, 2006, 2011, 2016.

3.3.6 SUMMARY OF LOCAL FARM PRODUCTION ACTIVITY

The census data reveals a steady decline in farm numbers and the total acreage of farmland in Thunder Bay District over the last ten years. Most of the drop-off in farmland area is linked to natural land used for pasture and other land (i.e. woodland, wetland) and as of 2016, over half of reported farmland in Thunder Bay District continues to be used for crop production. Historically, the Thunder Bay area reported a larger area in agricultural production and there appears to be opportunities for bringing some of this land back into production with appropriate soil management/improvement practices.

Livestock farms account for almost half of the farms in Thunder Bay District and a substantial area of the crop land is used for producing livestock feed (e.g. hay, corn for silage). Beef production experienced pronounced declines over the last ten years while dairy production experienced a slight decline and both hog and sheep/lamb production expanded. There was an especially large drop-off in chicken production in the region in the last ten years which can largely be attributed to the exit of a local layer operation.

Relatively small acreages are associated with field vegetable crops and fruit/berry crops in the region and data suppression issues makes it difficult to determine production amounts. This is also the case for greenhouse vegetable production.

In general, the agriculture census data illustrates/confirms that a variety of agricultural production is taking place in the region but a fuller account of production could be derived by reviewing the data with local producers/commodity groups to better estimate the production that is occurring and to understand the longer-term trends that are emerging.

The agriculture census data that is available can be used in conjunction with other data including food consumption data to provide another perspective on the growth opportunities for local agriculture in Thunder Bay District. The following table presents estimates of current production amounts for select food commodities in Thunder Bay District compared to estimates of consumption for the same food commodities in Thunder Bay District. The difference in these estimates represents the annual food deficit that local production could potentially address. We emphasize that some of the food deficit estimates are derived from data that reflects provincial averages but even so, if we assume a slightly lower consumption rate for Thunder Bay District the resulting food deficit figures are still substantial. For example, we estimate that there is a local food deficit of over 3,400 tonnes of potatoes.

Table 54: Food Deficit Estimates for Select Commodities in Thunder Bay District, 2016

Food item	Thunder Bay District Production				Thunder Bay District Consumption			Food Deficit tonnes
	Production area[a]		Yield tonnes per hectare[b]	Yield total tonnes	Annual consumption per person kgs[c]	Total population (15 years +)[d]	Total annual consumption (15 years +) tonnes	
	Acres	Hectares						
Potatoes	270	109.3	20.7	2,265.1	57.2	99,880	5,713.1	3,448.1
Carrots	14	5.7	50.8	287.8	11	99,880	1,098.7	810.9
Dry onions	4	1.6	38.8	62.8	8.4	99,880	839.0	776.2
Cabbage	4	1.6	28.2	45.6	5.4	99,880	539.4	493.7
Tomatoes	4	1.6	73.2	118.5	31.4	99,880	3,136.2	3,017.7
Green/wax beans	3	1.2	7.2	8.7	1.9	99,880	189.8	181.0
Sweet corn	15	6.1	11.1	67.4	7.7	99,880	769.1	701.7
Apples	4	1.6	26.4	42.7	23.5	99,880	2,347.2	2,304.4

[a] Source: Statistics Canada, Census of Agriculture, 2016.

[b] Source: All of the yield data reflects provincial averages (except potatoes) and is sourced from Agricultural Statistics for Ontario, OMAFRA; Seasonal Fruit and Vegetable Annual Summary Reports, OMAFRA; Fruit and Vegetable Survey, Statistics Canada, 2016; Yield data for potatoes reflects the Thunder Bay average and is sourced from Canadian Potato Production and Census of Agriculture 2006 & 2011, Statistics Canada.

[c] Source: Econometric Research Limited, Harry Cummings and Associates, Dr. Rod MacRae, (2015). These figures represent provincial averages for Ontario.

[d] Source: Statistics Canada, Population Census, 2016.

Note: Estimates for livestock / poultry product deficits (e.g. beef, pork, lamb, chicken) were not made given that the livestock/poultry inventory data from the Census of Agriculture represents a snapshot of the inventory on a single day in May and not the year-end total inventory.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4.0 CONCLUSIONS AND RECOMMENDATIONS

The results of the FAMS study indicate that there is considerable interest among Thunder Bay businesses and organizations in procuring locally grown / harvested foods and it extends across the full length of the local food chain (e.g. food processing, food distribution, food retail, prepared food sector and food programs).

One of the key motivating factors for sourcing locally grown / harvested food products and/or locally processed foods is that it benefits the local economy. Another key factor that drives this interest is the belief that locally grown / harvested food products are fresher and higher quality than non-local. Many of the businesses that were engaged as part of this study reported that the use of locally grown / harvested food products added value to their operations.

However, there are also several factors that cause concern for businesses/organizations when it comes to sourcing locally grown / harvested food products. One factor is cost, specifically the observation / perception that locally grown / harvested food products are more expensive than non-local. On this matter, most businesses appreciate that a higher quality local item has more value than a lower quality, lower priced non-local item and they would be prepared to pay more for the local item. As an added qualifier though, many businesses stipulated that the local product could not be priced significantly higher than the non-local option and that the quality of the local product needs to be consistently maintained (this includes meeting food safety standards).

Another key and perhaps more significant concern that businesses/organizations have in relation to procuring locally grown / harvested foods is the uncertainty of product availability in terms of the consistency (e.g. week to week) and overall volume they require. On a related theme, there is interest in establishing a more efficient procurement / delivery mechanism for accessing locally grown / harvested foods and this includes interest in accessing semi-processed food items (e.g. sliced carrots, potatoes, etc.).

In examining the quantity of local and non-local foods being procured by Thunder Bay and area businesses/organizations, the study determined that there are a number of food commodities where there are significant local food deficits that could potentially be addressed by local producers / processors. The following table provides an overview of some of the larger local food deficits that were identified through the study.

It is important to note that the figures presented in the table are derived from a small sample of businesses/organizations (103) across the local food chain and not all of them were able to provide data. As such, these figures represent only a partial picture of the total volume/weight of food items sourced from outside the Thunder Bay area.

Commodity	Annual volume / weight currently sourced from outside the Thunder Bay area *
Potatoes	over 530 tonnes
Carrots	over 175 tonnes
Tomatoes	over 110 tonnes
Dry onions	over 8 tonnes
Cabbage	over 72 tonnes (80,000 heads)
Romaine lettuce	over 9 tonnes (15,000 heads)
Sweet corn	over 32,000 cobs
Apples	over 6 tonnes
Strawberries	over 4 tonnes
Blueberries	over 3 tonnes
Canola oil	over 13 kilolitres
Vegetable oil	over 12 kilolitres

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

Commodity	Annual volume / weight currently sourced from outside the Thunder Bay area *
Ground beef	over 5 tonnes
Roast beef cuts	over 18 tonnes
Pork loin	over 12 tonnes
Pork shoulder	over 10 tonnes
Pork sausage	over 23 tonnes
Bacon	over 11 tonnes
Chicken breast	over 36 tonnes
Eggs, whole shell	over 40,000 dozen
Butter	over 6 tonnes
Cheese, mozzarella	over 17 tonnes
Cheese, blended	over 17 tonnes
Flour, all purpose	over 89 tonnes
Flour, fine sifted	over 5 tonnes

As noted above, the figures presented in the table do not represent the total local food deficit for the Thunder Bay area (i.e. the difference between total local food production and total local consumption). An analysis of select food items reveals that there are substantial food deficits that represent important growth opportunities for agriculture in the Thunder Bay area (e.g. local food deficit for potatoes = 3,400 tonnes; tomatoes = 3,000 tonnes; carrots = 800 tonnes; dry onions = 770 tonnes).

From the consumer perspective, we note that some of the interests/values of the local consumers mirror those of the businesses/organizations. For example, while food quality and in season freshness were identified by customers as important motivators for buying local, the leading stimulus that customers identified is that it benefits the local economy.

The majority of Country Market and grocery store customers that participated in this study reported that buying locally produced food items (produced within 100km of Thunder Bay) is important to them. The majority of customers also indicated that they are willing to pay more for high quality locally grown / harvested foods relative to non-local foods but it was stressed by some customers within this group that the prices for locally produced food items should not be priced substantially higher than comparable non-local items.

While food pricing was identified by some customers as a key factor that can limit their access to local foods, a more commonly identified factor is that locally produced foods are not broadly available in locations outside the Country Market (e.g. grocery stores, supermarket stores, convenience stores, etc.). Consumers are interested in seeing a greater presence of local foods in different food retail outlets and even the application of innovative approaches to food retail (e.g. pop-up markets, mobile markets).

Within the Country Market setting itself, customers identified a number of ways that the shopping experience could be improved including expanding the selection and amount of fresh local food available, improving physical accessibility within the building, and providing more information (e.g. farm management practices, where venders sell their product outside the market, educational workshops - cooking lessons, recipes, etc.).

The following recommendations are informed by the results of the FAMS study and focus on activities that will contribute to further advancing the development and expansion of the local food economy.

1. Share the results of the FAMS study with producers to raise awareness about the market demand opportunities that exist and provide guidance on how this information can be factored into their business planning.
2. Coordinate an annual Local Food/Drink Procurement Forum to bring local food producers and buyers together to share information on current/emerging food production activities and procurement needs, build relationships, stimulate ideas and form strategies for fostering more efficient and effective collaboration, and share best practice solutions.[22] The forum should include representatives from the agriculture sector, food retail sector, food distributors, food processors, the prepared food sector, food programs, economic development officials with the City of Thunder Bay, and financial institutions. Possible activities to feature at the forum include key note speakers, panel discussions, and interactive breakout discussion groups focusing on a variety of topics such as:
    - identifying/confirming local food system assets and opportunities for investment and local capacity building
    - sharing success stories on the movement of locally grown/harvested food products through local food distributors, retailers, restaurants and institutions
    - brainstorming actions / strategies for getting more locally grown/harvested food into retail outlets, restaurants and institutions
    - creating a multi-year action plan with short-term and long-term goals
3. Explore the feasibility of a local food hub / food innovation centre to provide a centralized location for local

22 Examples of local/regional food forum and stakeholder networking events:
- TORC Forum 2007: Capturing Local Food Opportunities.
    - http://www.ruralontarioinstitute.ca/file.aspx?id=93ac425b-34e9-4025-b327-22b8d8d93415
- Source it Here – Local Food Networking Event – Guelph Wellington Local Food
    - http://www.tastereal.com/events-2/source-it-here-b2b-networking/
    - http://www.tastereal.com/wp-content/uploads/2014/10/Source-It-Here-2016-Media-Release.pdf
- Cultivating Connections – Alberta Regional Food Systems Forum
    - https://cultivatingconnections2017.splashthat.com/
    - https://drive.google.com/file/d/0B0dgbN7UlrtzdS1oa0NpU2Q1a1k/vi

food distribution / food procurement activities and information sharing.[23] The multipurpose centre could feature the following elements:

- a warehouse storage area including industrial size cooler and freezer rooms
- designated areas for receiving fresh food deliveries and shipping fresh and processed foods
- a vegetable/fruit processing area with licensing from the appropriate authorities (e.g. rooms equipped with cleaning / slicing / dicing / bagging equipment)
- a commercial test kitchen for product development
- a public meeting room for hosting information and demonstration events (e.g. information sessions hosted by producers on the upcoming growing season and production plans and product availability; information sessions / cooking demonstrations hosted by chefs on preserves and extending the availability of local food products throughout the year; information sessions hosted by distributors on food supplier certification / audit criteria and specifications)
- Other organizations in the community could be exploring/advancing plans that are related to some of the features noted above and these should be identified / examined as part of the food hub planning process to determine areas of potential collaboration

4. Partner / work with grocery stores to identify and implement strategies to promote / market Thunder Bay products (e.g. improved signage, dedicated space). Partner / work with relevant advocacy groups/ organizations (I Choose TB, Ontario Culinary Tourism Alliance) to promote / market Thunder Bay products.
5. Support the Country Market in working with the CLE to advance short-term enhancements for improving accessibility to and within the building. Identify longer-term options for making the existing building fully accessible and/or options for relocating to another facility that is fully accessible.
   - Support the promotion and development of farmers' markets in the surrounding area.[24] Support can take the form of a variety of activities including logistic support and services (e.g. marketing and promotion, site management/maintenance) and acknowledging in planning/policy documents (e.g. official community plans, regional growth strategies, agriculture area plans, food strategies, etc.) to better enable relevant government departments to take action.
6. Identify and test approaches for establishing additional sites for the sale of local food (e.g. pop up markets, mobile food markets).[25]

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23 Examples of full service food hubs with activities related to production, aggregation, processing, and distribution of local food:
- Ottawa Food Hub / Eastern Ontario Food Hub Constellation:
  - http://nourishingontario.ca/wp-content/uploads/2015/11/EO-Food-Hub-Constellation-FINAL.pdf
  - http://ottawakitchen.ca/
- Two Rivers Food Hub – Eastern Ontario:
  - https://twoeriversfoodhub.com/
- Washtenaw Food Hub – Michigan
  - http://washtenawfoodhub.com/
- Quad Cities Food Hub – Iowa and Illinois
  - http://www.qcfoodhub.org/

Examples of food hub feasibility studies:
- Winnipeg, MB
  - http://www.foodmattersmanitoba.ca/wp-content/uploads/2014/06/WFH-Feasibility-Final-Report-mar-2014-photos.pdf
- Township of Langley, BC: https://www.tol.ca/your-township/plans-reports-and-strategies/food-hub-feasibility-study/
- Northwest Michigan: http://foodsystems.msu.edu/uploads/files/Feasibility_Report_for_a_Food_Hub.pdf
- Galesburg, Illinois: http://foodsystems.msu.edu/uploads/files/Galesburg_Feasibility_Study.pdf

Other resources / case studies of food hub related initiatives:
- http://nourishingontario.ca/ontario-food-hub-case-studies-2015/northern-ontario-case-studies-2015/
- http://foodsystems.msu.edu/resources/report/2015%20National%20Food%20Hub%20Survey%20Findings.pdf

24 Examples of markets in the surrounding area include Kakabeka Farmers' Market, Nolalu Market, Willow Springs Market (Lappe), Green Acres Market (Township of South Gillies).

25 Examples of mobile food markets that focus on sourcing food items that are locally grown:
- Wendy's Mobile Market – Rideau Lakes Township, ON
  - http://nourishingontario.ca/wendys-country-market/
  - http://www.wendyscountrymarket.com/delivery-service.html
- Real Food Farm Mobile Farmers Market – Baltimore, MD
  - https://civicworks.com/programs/real-food-farm/
  - https://baltimoreurbanagriculture.wordpress.com/real-food-farm-brings-produce-to-the-people/
- Mobile Oasis Farmers Market - Guilford County, NC
  - https://guilfordmobileoasis.com/news-updates-2
- Flint Fresh Mobile Market – Flint, MI
  - https://www.flintfresh.com/pages/mobile-market

https://www.citylab.com/life/2016/07/a-mobile-market-will-boost-access-to-healthy-food-in-flint/491846/

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APPENDICES

Thunder Bay + Area Food Strategy
Connecting Food and Community

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Food Strategy
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APPENDIX A: KEY INFORMANT INTERVIEW GUIDE FOR FOOD SECTOR BUSINESSES / ORGANIZATIONS

The following key informant interview guide was used with businesses in the prepared food sector. Similar interview guides were used with food processors, food distributors, food retailers, and food programs – with some small modifications to contextualize the tool for each specific stakeholder group.

INTRODUCTION AND DISCLAIMER

Hello, may I speak with ____________,

My name is ______________ and I'm calling on behalf of the Thunder Bay and Area Food Strategy.

We're conducting a study to examine job creation and business expansion opportunities in the food and agriculture sector in the Thunder Bay area.

We're reaching out to businesses and organizations to better understand their key food product requirements.

The data we're collecting will help to inform area farmers looking for ways to expand their businesses.

It will also help in identifying development opportunities in food processing and distribution where existing and new businesses can dovetail with local production to supply food retailers, restaurants and food programs with competitively priced local products.

The information you provide will be summarized with the interview data we're collecting from other organizations in the local food chain. No names or personal identifiers will be reported on.

Would you be interested in speaking to me about some of the key food products that you use in your operation?

If you want to learn more about the Food and Agriculture Market Study you can contact Amy Bumbacco, Thunder Bay and Area Food Strategy Coordinator at (807) 624 2143 or amy@ecosuperior.org.

BACKGROUND QUESTIONS

About the Business

1. In what year was your business established?
2. Around how many people does your business employ?
3. Do you have other outlets in the Thunder Bay area/Ontario/elsewhere? Yes No
   - If yes, how many other outlets?
4. What is the total area of your retail space (gross leasable area) at this location? (Please choose square feet or square meters).

LOCAL FOOD PURCHASES

5. Does your business buy any food grown within 100km of Thunder Bay, or buy any food products made with ingredients grown within 100km of Thunder Bay?

If yes:	If no:
1. What motivates you to purchase these foods? *Interviewer note: check off any of the following that apply:* ☐ higher quality ☐ contributes to the local economy ☐ animal welfare ☐ environmental health ☐ marketing tool ☐ distinguishes the business ☐ customers demand local food ☐ getting to know farmers ☐ other ______________________________ 2. Is there anything that would make purchasing local food easier for you?	3. What are some of the reasons you don't purchase food from within the area? *Interviewer note: check off any of the following that apply:* ☐ not enough volume ☐ consistency concerns ☐ high cost ☐ delivery challenges ☐ have to order through head office ☐ other ______________________________ 4. What would make it easier for you to purchase local food?

QUANTITATIVE QUESTIONS

Interviewer note:

These questions are designed to identify opportunities for local business to develop products to meet the respondent's existing needs. Start by identifying the kinds of products your respondent uses and focusing on the appropriate category(ies). For example, if it is known that your respondent specializes in certain types of ingredients for their menus e.g. meat/fish and/or fresh vegetables, start with proteins or vegetables and ask if they use significant quantities of ingredients from other categories that would be worth exploring.

If the key informant is unable to provide details on product spending/quantities during these conversations, offer to provide them with a follow-up email that they can reply to with some details on the use of the specific products they identified. Stress the value of this information in helping us to develop a fuller picture of the demand potential for commodities that local producers can respond to.

VEGETABLES

6. I'd like to talk further about specific food categories starting with vegetables. Do vegetables play a large role in your menu planning and do they represent a significant portion of your purchasing? I.e. are vegetables used as garnish, side salads, or features for main dishes?What vegetables do you buy the most of? This would include things like root vegetables, cabbage, broccoli, salad greens, tomatoes, onions, corn, garlic, fresh herbs, and mushrooms.

Item 1:

1. Can you give us an idea of how much of this vegetable you use on a yearly basis ($ value or quantity)?
2. Do you use this vegetable seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item?   Are there any price-quality trade-offs that you take into consideration?
4. How do you need this vegetable to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________

   How important are food standard/ consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
5. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
6. If more of this vegetable was to become available locally, would you want to buy more if it?

Item 2:

You also mentioned you used a lot of...

1. Can you give us an idea of how much of this vegetable you use on a yearly basis ($ value or quantity)?
2. Do you use this vegetable seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item?   Are there any price-quality trade-offs that you take into consideration?
4. How do you need this vegetable to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________

   How important are food standard/ consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
5. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
6. If more of this vegetable was to become available locally, would you want to buy more if it?

The interview could continue with more vegetables.

PROTEINS

7. Next, I'd like to talk about proteins. Do meats play a large role in your menu planning and do they represent a significant portion of your purchasing? I.e. are proteins used in sides or as main dish features?

   What proteins do you buy the most of? This includes beef, pork, trout, walleye, whitefish, chicken, lamb/mutton, goat, chicken, turkey, and duck.

Item 1:

1. Can you give us an idea of how much of this protein you use on a yearly basis ($ value or quantity)?
2. Do you use this protein seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this protein to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this protein was to become available locally, would you want to buy more if it?

Item 2:

You also mentioned you used a lot of...

1. Can you give us an idea of how much of this protein you use on a yearly basis ($ value or quantity)?
2. Do you use this protein seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this protein to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this protein was to become available locally, would you want to buy more if it?

The interview could continue with more proteins.

PULSE CROPS, GRAINS & OILS

8. Pulse crops include includes flours, whole grains like oats and barley, pulses like lentils, chickpeas and dried beans, and seed oils like canola. Do any of these items play a big role in your kitchen? What pulse crops, grains, or oils do you buy the most of?

Item 1:

1. Can you give us an idea of how much of this product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________
5. How important are food standard/ consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this product was to become available locally, would you want to buy more if it?

Item 2:

You also mentioned you used a lot of...

1. Can you give us an idea of how much of this product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need unblemished, regular shaped food or foods of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this product was to become available locally, would you want to buy more if it?

The interview could continue with more pulse crops, grains and oils.

DAIRY PRODUCTS

9. Are dairy products important in your purchasing? Is dairy used as dips, sides or as main dish features? What dairy products do you buy the most of? This includes pasteurized fluid milk products, real butter, sour cream, cheese, yogurt, ice cream.

Item 1:

1. Can you give us an idea of how much of this dairy product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this dairy product was to become available locally, would you want to buy more if it?

Item 2:

You mentioned you also buy a lot of...

1. Can you give us an idea of how much of this dairy product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this dairy product was to become available locally, would you want to buy more if it?

The interview could continue with more dairy products.

EGGS

10. How do you use eggs in your kitchen – are they used in small amounts, in side dishes, or as a main dish feature? What egg products do you buy the most of? This includes chicken eggs, duck eggs or other eggs as well as processed eggs.

Item 1:

1. Can you give us an idea of how much of this egg product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this egg product was to become available locally, would you want to buy more if it?

Item 2:

You also mentioned you buy a lot of...

1. Can you give us an idea of how much of this egg product you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor
   ☐ in certain processed state
   ☐ in a specific container
   ☐ in a particular quantity
   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this egg product was to become available locally, would you want to buy more if it?

The interview could continue with more egg products.

FRUITS AND BERRIES

11. Do you use a lot of fruits or berries in your kitchen? What about products made with fruits or berries? Are fruits/berries used in garnishes or colouring, in side dishes, or as a main dish feature? What fruits/berries do you buy the most of? This includes cultivated strawberries, raspberries and blueberries, wild blueberries, crab apples, apples, including processed foods like jams and jellies.

Item 1:

1. Can you give us an idea of how much of this fruit/berry you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this fruit/berry was to become available locally, would you want to buy more if it?

Item 2:

You also mentioned you bought a lot of...

1. Can you give us an idea of how much of this fruit/berry you use on a yearly basis ($ value or quantity)?
2. Do you use this product seasonally or year-round?

   Interview follow-up: If seasonally, in what months?
3. How price-sensitive are you on this item? Are there any price-quality trade-offs that you take into consideration?
4. How do you need this item to arrive?

   Interviewer note: Check off any of the following that apply, prompting for each of the points

   ☐ via distributor

   ☐ in certain processed state

   ☐ in a specific container

   ☐ in a particular quantity

   ☐ Other? ______________________
5. How important are food standard/consistency considerations in your purchasing decisions? For example, do you need products of certain grades?
6. Of the total volume of this food item that you sourced in the most recent business year, did any of it come from within 100km of Thunder Bay?

   Interview follow-up: What percentage?
7. If more of this fruit/berry was to become available locally, would you want to buy more if it?

The interview could continue with more fruits and berries.

OTHER

12. Are there any other food products that are important for your operation that we haven't already discussed? (e.g. mushrooms, maple syrup, honey, etc.) If so, please elaborate

MOTIVATIONS FOR LOCAL FOOD PROCUREMENT

I just have a couple list questions for you about your motivation behind local food procurement.

13. Would you consider purchasing a local product of higher quality at a higher cost than a non-local product of lesser quality?

    Interview follow-up: Please elaborate.

14. What does "higher quality" mean to you?
15. If the interviewee does use local food, does local food add value to your business?

FINAL COMMENTS

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

Thank you for participating in this interview!

APPENDIX B: COUNTRY MARKET CUSTOMER SURVEY

Suggested script:

Hello! My name is ______________________ and I am conducting a survey on behalf of the Thunder Bay and Area Food Strategy. We want to understand your engagement with local food so we can better supply it for you.

Would you be interested in filling out a quick 5-minute survey?

Interviewer initial:________ Interview #:________ Time of survey:________ Date:________

1. When did you start shopping at the Country Market?

- ☐ 1 = 2017 (this year)
- ☐ 2 = 2016 (last year)
- ☐ 3 = 2015
- ☐ 4 = 3-4 years ago (2013-2014)
- ☐ 5 = 5-9 years ago (2008-2012)
- ☐ 6 = 10 or more years ago

2. How often do you come to the Country Market?

- ☐ 1 = First time visitor
- ☐ 2 = Rarely (1x per year)
- ☐ 3 = Occasionally (2-3x per year)
- ☐ 4 = Often (1x/month)
- ☐ 5 = Frequently (2-3x/month)
- ☐ 6 = Regularly (almost weekly)

3. How much have you spent on food items at the Country Market today?

- ☐ 1 = Nothing
- ☐ 2 = $1-20
- ☐ 3 = $21 - $40
- ☐ 4 = $41 - $60
- ☐ 5 = $61 - $80
- ☐ 6 = $81 - $100
- ☐ 7 = $101 - $120
- ☐ 8 = $121 - $140
- ☐ 9 = More than $140

4. There are a wide range of factors that people consider when buying food. We would like to know how important the following factors are to you. Please indicate the level of importance you attached to each of the following factors in your food purchasing decisions.

	1 = Not Important	2 = Somewhat important	3 = Important	4 = Very important	No opinion
Food quality					
Food safety					
Nutritional value					
Price					
Environmental impact					
In season (fresh)					
Availability					
Grown or produced locally (within 100km of Thunder Bay)					
Grown or produced in Ontario (not including locally produced)					
Grown or produced by someone you know					

5. What is missing from the Country Market that you would like to see?
(e.g. a particular kind of product, or particular information about the market)

6. If you purchase local food, what motivates you to buy local food? (check all that apply)

- ☐ 1 = Food quality
- ☐ 2 = Food safety
- ☐ 3 = Nutritional value
- ☐ 4 = Price
- ☐ 5 = Environmental impact
- ☐ 6 = In season (freshness)
- ☐ 7 = Availability
- ☐ 8 = Grown or produced by someone you know
- ☐ 9 = Benefits to local economy
- ☐ Other, please specify ________________________________

7. What would make it easier for you to buy local food?

8. How do you feel about paying for local food?

- ☐ 1 = I am willing to pay less for local food than non-local food
- ☐ 2 = I am willing to pay the same for local food as for non-local food
- ☐ 3 = I am willing to pay more for local food than non-local food

9. Please indicate the extent to which you disagree/agree with the following statements about the Country Market.

	1 = Strongly Disagree	2 = Disagree	3 = Neutral	4 = Agree	5 = Strongly Agree	6 = Don't know
The Country Market provides access to good quality, fresh food.						
The Country Market provides opportunities to learn about how farm products are produced.						
The Country Market provides valuable connections to other community activities.						
Shopping at the Country Market builds trusting relationships between vendors and customers.						
The Country Market is a social hub/good place to socialize.						
Buying at the Country Market has a positive impact on the local economy.						
Buying at the Country Market supports sustainable agricultural practices.						
The Country Market feels welcoming to all people.						
I can reliably find what I am looking for at the Country Market.						
The Country Market is a destination for good entertainment.						
The Country Market is a good use of community space.						
The Country Market is a good, family friendly place to bring children.						

10. How is the Country Market a community hub? In other words, how do you engage with the market? Telling a story is welcome.

11. Is there anything else you would like the market to know (e.g. suggestions for improvement, anything you want to see more of, interest in other food products / services, etc.)?

DEMOGRAPHIC INFORMATION

(This information will help us to develop a general summary of all the participants in the survey. We will not be reporting on the characteristics of individual respondents)

12. Gender: 1 = Male 2 = Female 3 = Other ___ Prefer not to answer

13. Age

- ☐ 1 = 19 years or under
- ☐ 2 = 20 – 29 years
- ☐ 3 = 30 – 39 years
- ☐ 4 = 40 – 49 years
- ☐ 5 = 50 – 59 years
- ☐ 6 = 60 years or older
- ☐ 7 = Prefer not to answer

14. Highest level of education completed

- ☐ 1 = Primary
- ☐ 2 = Secondary (high school)
- ☐ 3 = College / trade school
- ☐ 4 = University
- ☐ 5 = Prefer not to answer

Thank you for completing this survey!

APPENDIX C: GROCERY STORE CUSTOMER SURVEY

Suggested script:

Hello! My name is ______________________ and I am conducting a survey on behalf of the Thunder Bay and Area Food Strategy. We want to understand your engagement with local food so we can better supply it for you.

Would you be interested in filling out a quick 5-minute survey?

Interviewer initial:________ Interview #:________ Time of survey:________ Date:________

1. When did you start shopping at the Country Market?

- ☐ 1 = 2017 (this year)
- ☐ 2 = 2016 (last year)
- ☐ 3 = 2015
- ☐ 4 = 3-4 years ago (2013-2014)
- ☐ 5 = 5-9 years ago (2008-2012)
- ☐ 6 = 10 or more years ago

2. How often do you come to the Country Market?

- ☐ 1 = First time visitor
- ☐ 2 = Rarely (1x per year)
- ☐ 3 = Occasionally (2-3x per year)
- ☐ 4 = Often (1x/month)
- ☐ 5 = Frequently (2-3x/month)
- ☐ 6 = Regularly (almost weekly)

3. How much have you spent on food items at the Country Market today?

- ☐ 1 = Nothing
- ☐ 2 = $1-20
- ☐ 3 = $21 - $40
- ☐ 4 = $41 - $60
- ☐ 5 = $61 - $80
- ☐ 6 = $81 - $100
- ☐ 7 = $101 - $120
- ☐ 8 = $121 - $140
- ☐ 9 = More than $140

4. There are a wide range of factors that people consider when buying food. We would like to know how important the following factors are to you. Please indicate the level of importance you attached to each of the following factors in your food purchasing decisions.

	1 = Not Important	2 = Somewhat important	3 = Important	4 = Very important	No opinion
Food quality					
Food safety					
Nutritional value					
Price					
Environmental impact					
In season (fresh)					
Availability					
Grown or produced locally (within 100km of Thunder Bay)					
Grown or produced in Ontario (not including locally produced)					
Grown or produced by someone you know					

5. What is missing from the Country Market that you would like to see? (e.g. a particular kind of product, or particular information about the market)

6. Do you purchase local food? (Food produced within 100 km of Thunder Bay)

- ☐ Yes - go to question 7
- ☐ No - go to question 10
- ☐ Don't know - go to question 11

7. What motivates you to buy local food? (check all that apply)

- ☐ 1 = Food quality
- ☐ 2 = Food safety
- ☐ 3 = Nutritional value
- ☐ 4 = Price
- ☐ 5 = Environmental impact
- ☐ 6 = In season (freshness)
- ☐ 7 = Availability
- ☐ 8 = Grown or produced by someone you know
- ☐ 9 = Benefits to local economy
- ☐ Other, please specify ________________________________

8. What would make it easier for you to buy local food?

9. How do you feel about paying for local food?

- ☐ 1 = I am willing to pay less for local food than non-local food
- ☐ 2 = I am willing to pay the same for local food as for non-local food
- ☐ 3 = I am willing to pay more for local food than non-local food

10. What are the reasons why you don't purchase local food? (check all that apply)

- ☐ 1 = Lower quality
- ☐ 2 = More expensive
- ☐ 3 = Not discernible or different from non-local food
- ☐ 4 = I do not know where to find them
- ☐ 5 = Local food is not available
- ☐ 6 = Not convenient
- ☐ Other, please specify ________________________________

11. Is there anything else you would like the grocery store to know (e.g. suggestions for improvement, anything you want to see more of, interest in other food products / services, etc.)?

DEMOGRAPHIC INFORMATION

(This information will help us to develop a general summary of all the participants in the survey. We will not be reporting on the characteristics of individual respondents)

12. Gender: 1 = Male 2 = Female 3 = Other ___ Prefer not to answer

13. Age

- ☐ 1 = 19 years or under
- ☐ 2 = 20 – 29 years
- ☐ 3 = 30 – 39 years
- ☐ 4 = 40 – 49 years
- ☐ 5 = 50 – 59 years
- ☐ 6 = 60 years or older
- ☐ 7 = Prefer not to answer

14. Highest level of education completed

- ☐ 1 = Primary
- ☐ 2 = Secondary (high school)
- ☐ 3 = College / trade school
- ☐ 4 = University
- ☐ 5 = Prefer not to answer

Thank you for completing this survey!

APPENDIX D: DATA TABLES FOR THE COUNTRY MARKET CUSTOMER SURVEY

Characteristics of Country Market survey respondents

Gender	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
Male	28	21.7%	14	9.9%	25	25.0%	67	18.1%
Female	97	75.2%	122	85.9%	75	75.0%	294	79.2%
Prefer not to answer	4	3.1%	6	4.2%	0	0.0%	10	2.7%
Total	**129**	**100%**	**142**	**100%**	**100**	**100%**	**371**	**100%**

Age	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
19 years or under	1	0.8%	2	1.4%	0	0%	3	0.8%
20 to 29 years	13	10.2%	21	14.8%	7	7.0%	41	11.1%
30 to 39 years	46	35.9%	30	21.1%	14	14.0%	90	24.4%
40 to 49 years	20	15.6%	39	27.5%	28	28.0%	87	23.5%
50 to 59 years	21	16.4%	25	17.6%	16	16.0%	62	16.8%
60 years or older	24	18.8%	21	14.8%	33	33.0%	78	21.1%
Prefer not to answer	3	2.3%	4	2.8%	2	2.0%	9	2.4%
Total	**128**	**100%**	**142**	**100%**	**100**	**100%**	**370**	**100%**

Highest level of education	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
Primary	0	0.0%	1	0.7%	1	1.0%	2	0.5%
Secondary/high school	9	7.0%	19	13.4%	11	11.0%	39	10.5%
College/trade school	26	20.2%	51	35.9%	33	33.0%	110	29.6%
University	88	68.2%	68	47.9%	53	53.0%	209	56.3%
Prefer not to answer	6	4.7%	3	2.1%	2	2.0%	11	3.0%
Total	**129**	**100%**	**142**	**100%**	**100**	**100%**	**371**	**100%**

When did you start shopping at the Country Market?

Year started shopping at the Country Market	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
2017 (first year)	4	3.1%	10	6.5%	5	5.0%	19	4.9%
2016	5	3.8%	7	4.5%	4	4.0%	16	4.2%
2015	11	8.4%	13	8.4%	10	10.0%	34	8.8%
3-4 years ago	27	20.6%	41	26.6%	14	14.0%	82	21.3%
5-9 years ago	53	40.5%	59	38.3%	30	30.0%	142	36.9%
10 or more years	31	23.7%	24	15.6%	37	37.0%	92	23.9%
Total	**131**	**100%**	**154**	**100%**	**100**	**100%**	**385**	**100%**

How often do you come to the Country Market?

Frequency of visits	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
First time visitor	2	1.5%	2	1.3%	3	3.0%	7	1.8%
Rarely (1x per year)	5	3.8%	8	5.2%	4	4.0%	17	4.4%
Occasionally (2-3x per year)	31	23.7%	39	25.3%	5	5.0%	75	19.5%
Often (1x/month)	49	37.4%	48	31.2%	10	10.0%	107	27.8%
Frequently (2-3x/month)	26	19.8%	23	14.9%	22	22.0%	71	18.4%
Regularly (almost weekly)	18	13.7%	34	22.1%	56	56.0%	108	28.1%
Total	**131**	**100%**	**154**	**100%**	**100**	**100%**	**385**	**100%**

How do you feel about paying for local food?

Feelings about paying for local food	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
Pay less for local	1	0.8%	0	0.0%	1	1.0%	2	0.5%
Pay the same	33	25.2%	55	36.9%	22	22.0%	110	28.9%
Pay more for local	97	74.0%	94	63.1%	77	77.0%	268	70.5%
Total	**131**	**100%**	**149**	**100%**	**100**	**100%**	**380**	**100%**

How much have you spent on food items at the Country Market today? (or during your most recent visit to the Country Market)

Amount spent	EcoSuperior weblink		Country Market weblink		Country Market on site		Total	
	#	%	#	%	#	%	#	%
Nothing	4	3.1%	4	2.6%	3	3.0%	11	2.9%
$1-$20	11	8.4%	29	18.8%	23	23.0%	63	16.4%
$21-$40	41	31.3%	54	35.1%	38	38.0%	133	34.5%
$41-$60	38	29.0%	35	22.7%	17	17.0%	90	23.4%
$61-$80	20	15.3%	14	9.1%	5	5.0%	39	10.1%
$81-$100	7	5.3%	10	6.5%	4	4.0%	21	5.5%
$101-$120	8	6.1%	3	1.9%	8	8.0%	19	4.9%
$121-$140	1	.8%	2	1.3%	1	1.0%	4	1.0%
More than $140	1	.8%	3	1.9%	1	1.0%	5	1.3%
Total	**131**	**100%**	**154**	**100%**	**100**	**100%**	**385**	**100%**

What motivates you to buy local food?

Motivations for buying local food	EcoSuperior weblink		Country Market weblink		Country Market on-site		Total	
	#	%	#	%	#	%	#	%
Food quality	110	84%	130	84.4%	32	32.0%	272	70.6%
Food safety	51	38.9%	60	39.0%	23	23.0%	134	34.8%
Nutritional value	70	53.4%	62	40.3%	25	25.0%	157	40.8%
Price	27	20.6%	50	32.5%	4	4.0%	81	21.0%
Environmental impact	88	67.2%	73	47.4%	27	27.0%	188	48.8%
In season (freshness)	105	80.2%	114	74.0%	35	35.0%	254	66.0%
Availability	44	33.6%	70	45.5%	12	12.0%	126	32.7%
Grown or produced by someone you know	55	42.0%	53	34.4%	21	21.0%	129	33.5%
Benefits to local economy	116	88.5%	127	82.5%	66	66.0%	309	80.3%
Other*	9	6.9%	12	7.8%	14	14.0%	35	9.1%

Respondents were allowed to select more than one option.

**'Other' motivations include: certified organic, better flavour, unique product availability, educating self and children about where food comes from, and the social enjoyment associated with being at the market.*

There are a wide range of factors that people consider when buying food. How important are the following factors to you?

Importance of factors in buying food	Survey location	Not important		Somewhat important		Important		Very important		No opinion		Total	
		#	%	#	%	#	%	#	%	#	%	#	%
Food quality	ES web	0	0%	1	0.8%	14	10.7%	116	88.5%	0	0%	131	100%
	CM web	0	0%	3	2.0%	13	8.5%	137	89.0%	0	0%	153	100%
	CM	0	0%	2	2.0%	18	18%	80	80%	0	0%	100	100%
	Total	**0**	**0%**	**6**	**1.6%**	**45**	**11.7%**	**333**	**86.7%**	**0**	**0%**	**384**	**100%**
Food safety	ES web	0	0%	5	3.8%	24	18.3%	100	76.3%	2	1.5%	131	100%
	CM web	1	0.6%	6	3.9%	31	20.1%	115	74.7%	1	0.6%	154	100%
	CM	0	0%	4	4%	24	24%	72	72%	0	0%	100	100%
	Total	**1**	**0.3%**	**15**	**3.9%**	**79**	**20.5%**	**287**	**74.5%**	**3**	**0.8%**	**385**	**100%**
Nutritional value	ES web	2	1.5%	10	7.7%	47	36.2%	69	53.1%	2	1.5%	130	100%
	CM web	4	2.6%	17	11.1%	63	41.2%	69	45.1%	0	0%	153	100%
	CM	1	1%	8	8%	24	24%	67	67%	0	0%	100	100%
	Total	**7**	**1.8%**	**35**	**9.1%**	**134**	**35%**	**205**	**53.5%**	**2**	**0.5%**	**383**	**100%**
Price	ES web	5	3.8%	24	18.3%	60	45.8%	40	30.5%	2	1.5%	131	100%
	CM web	1	0.6%	22	14.3%	80	51.9%	51	33.1%	0	0%	154	100%
	CM	7	7%	40	40%	39	39%	14	14%	0	0%	100	100%
	Total	**13**	**3.4%**	**86**	**22.3%**	**179**	**46.5%**	**105**	**27.3%**	**2**	**0.5%**	**385**	**100%**
Environmental impact	ES web	0	0%	17	13.1%	54	41.5%	59	45.4%	0	0%	130	100%
	CM web	6	3.9%	33	21.6%	68	44.4%	43	28.1%	3	2.0%	153	100%
	CM	4	4%	14	14%	31	31%	51	51%	0	0%	100	100%
	Total	**10**	**2.6%**	**64**	**16.7%**	**153**	**39.9%**	**153**	**39.9%**	**3**	**0.8%**	**383**	**100%**
In season (freshness)	ES web	0	0%	13	10%	47	36.2%	70	53.8%	0	0%	130	100%
	CM web	1	0.6%	15	9.7%	50	32.5%	87	56.5%	1	0.6%	154	100%
	CM	3	3%	9	9%	18	18%	70	70%	0	0%	100	100%
	Total	**4**	**1%**	**37**	**9.6%**	**115**	**29.9%**	**227**	**59.1%**	**1**	**0.3%**	**384**	**100%**
Availability	ES web	4	3.1%	17	13.1%	63	48.5%	40	30.8%	6	4.6%	130	100%
	CM web	1	0.7%	26	17.0%	61	39.9%	64	41.8%	1	0.7%	153	100%
	CM on site	11	11.0%	18	18.0%	39	39.0%	31	31.0%	1	1.0%	100	100%
	Total	**16**	**4.2%**	**61**	**15.9%**	**163**	**42.6%**	**135**	**35.2%**	**8**	**2.1%**	**383**	**100%**

Importance of factors in buying food	Survey location	Not important		Somewhat important		Important		Very important		No opinion		Total	
		#	%	#	%	#	%	#	%	#	%	#	%
Grown or produced locally (within 100 km of Thunder Bay)	ES web	4	3.1%	19	14.5%	46	35.1%	62	47.3%	0	0.0%	131	100%
	CM web	4	2.6%	29	18.8%	46	29.9%	73	47.4%	2	1.3%	154	100%
	CM on site	2	2.0%	1	1.0%	19	19.0%	78	78.0%	0	0.0%	100	100%
	Total	**10**	**2.6%**	**49**	**12.7%**	**111**	**28.8%**	**213**	**55.3%**	**2**	**0.5%**	**385**	**100%**
Grown or produced in Ontario (not including locally)	ES web	8	6.1%	24	18.3%	74	56.5%	22	16.8%	3	2.3%	131	100%
	CM web	7	4.6%	40	26.1%	70	45.8%	35	22.9%	1	0.7%	153	100%
	CM on site	13	13.0%	23	23.0%	41	41.0%	23	23.0%	0	0.0%	100	100%
	Total	**28**	**7.3%**	**87**	**22.7%**	**185**	**48.2%**	**80**	**20.8%**	**4**	**1.0%**	**384**	**100%**
Grown or produced by someone you know	ES web	31	23.7%	39	29.8%	29	22.1%	28	21.4%	4	0.0%	131	100%
	CM web	46	29.9%	37	24.0%	32	20.8%	35	22.7%	4	2.6%	154	100%
	CM on site	34	34.3%	21	21.2%	19	19.2%	24	24.2%	1	1.0%	99	100%
	Total	**111**	**28.9%**	**97**	**25.3%**	**80**	**20.8%**	**87**	**22.7%**	**9**	**2.3%**	**384**	**100%**

To what extent do you disagree/agree with the following statements about the Country Market?

Country Market features	Survey location	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Don't know		Total	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Provides access to good quality, fresh food	ES web	0	0%	1	0.8%	2	1.6%	53	41.4%	72	56.3%	0	0%	128	100%
	CM web	1	0.7%	0	0%	7	4.9%	33	23.2%	101	71.1%	0	0%	142	100%
	CM on site	0	0%	1	1%	1	1%	24	24.2%	72	72.7%	1	1%	99	100%
	Total	**1**	**0.3%**	**2**	**0.5%**	**10**	**2.7%**	**110**	**29.8%**	**245**	**66.4%**	**1**	**0.3%**	**369**	**100%**
Provides opportunities to learn	ES web	0	0%	7	5.4%	35	27.1%	61	47.3%	19	14.7%	7	5.4%	129	100%
	CM web	1	0.7%	6	4.3%	38	27%	56	39.7%	35	24.8%	5	3.5%	141	100%
	CM on site	0	0%	7	7.1%	23	23.2%	49	49.5%	19	19.2%	1	1%	99	100%
	Total	**1**	**0.3%**	**20**	**5.4%**	**96**	**26%**	**166**	**45%**	**73**	**19.8%**	**13**	**3.5%**	**369**	**100%**
Provides valuable connections	ES web	2	1.6%	3	2.3%	40	31%	58	45%	16	12.4%	10	7.8%	129	100%
	CM web	2	1.4%	8	5.6%	39	27.5%	58	40.8%	27	19%	8	5.6%	142	100%
	CM on site	0	0%	10	10.1%	41	41.4%	34	34.3%	13	13.1%	1	1%	99	100%
	Total	**4**	**1.1%**	**21**	**5.7%**	**120**	**32.4%**	**150**	**40.5%**	**56**	**15.1%**	**19**	**5.1%**	**370**	**100%**
Builds trust	ES web	0	0%	1	0.8%	20	15.5%	60	46.5%	47	36.4%	1	0.8%	129	100%
	CM web	0	0%	2	1.4%	15	10.6%	64	45.1%	59	41.5%	2	1.4%	142	100%
	CM on site	0	0%	0	0%	3	3%	40	40.4%	54	54.5%	2	2%	99	100%
	Total	**0**	**0%**	**3**	**0.8%**	**38**	**10.3%**	**164**	**44.3%**	**160**	**43.2%**	**5**	**1.4%**	**370**	**100%**
Social hub	ES web	2	1.6%	3	2.3%	25	19.4%	50	38.8%	47	36.4%	2	1.6%	129	100%
	CM web	2	1.4%	4	2.8%	17	12%	57	40.1%	59	41.5%	3	2.1%	142	100%
	CM on site	0	0%	2	2%	9	9.2%	43	43.9%	42	42.9%	2	2%	98	100%
	Total	**4**	**1.1%**	**9**	**2.4%**	**51**	**13.8%**	**150**	**40.7%**	**148**	**40.1%**	**7**	**1.9%**	**369**	**100%**
Positive impact on economy	ES web	0	0%	0	0%	3	2.3%	39	30.2%	85	65.9%	2	1.6%	129	100%
	CM web	0	0%	2	1.4%	2	1.4%	42	29.8%	94	66.7%	1	0.7%	141	100%
	CM on site	0	0%	1	1%	1	1%	27	27.3%	68	68.7%	2	2%	99	100%
	Total	**0**	**0%**	**3**	**0.8%**	**6**	**1.6%**	**108**	**29.3%**	**247**	**66.9%**	**5**	**1.4%**	**369**	**100%**

Country Market features	Survey location	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Don't know		Total	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%
Supports sustainable agricultural practices	ES web	0	0%	1	0.8%	8	6.3%	45	35.2%	67	52.3%	7	5.5%	128	100%
	CM web	0	0%	4	2.8%	6	4.3%	50	35.5%	76	53.9%	5	3.5%	141	100%
	CM on site	0	0%	1	1%	8	8.1%	27	27.3%	62	62.6%	1	1%	99	100%
	Total	**0**	**0%**	**6**	**1.6%**	**22**	**6%**	**122**	**33.2%**	**205**	**55.7%**	**13**	**3.5%**	**368**	**100%**
Feels welcoming to all people	ES web	5	3.9%	8	6.3%	13	10.2%	48	37.5%	47	36.7%	7	5.5%	128	100%
	CM web	2	1.4%	9	6.3%	25	17.6%	45	31.7%	57	40.1%	4	2.8%	142	100%
	CM on site	1	1%	6	6.1%	5	5.1%	27	27.3%	59	59.6%	1	1%	99	100%
	Total	**8**	**2.2%**	**23**	**6.2%**	**43**	**11.7%**	**120**	**32.5%**	**163**	**44.2%**	**12**	**3.3%**	**369**	**100%**
Can find what I am looking for	ES web	3	2.3%	14	10.9%	34	26.4%	59	45.7%	18	14%	1	0.8%	129	100%
	CM web	2	1.4%	13	9.3%	18	12.9%	82	58.6%	25	17.9%	0	0%	140	100%
	CM on site	0	0%	6	6.1%	9	9.1%	41	41.4%	42	42.4%	1	1%	99	100%
	Total	**5**	**1.4%**	**33**	**9%**	**61**	**16.6%**	**182**	**49.5%**	**85**	**23.1%**	**2**	**0.5%**	**368**	**100%**
Destination for good entertainment	ES web	4	3.1%	15	11.%6	64	49.6%	28	21.7%	9	7%	9	7%	129	100%
	CM web	2	1.4%	18	12.7%	56	39.4%	45	31.7%	12	8.5%	9	6.3%	142	100%
	CM on site	1	1%	21	21.2%	19	19.2%	42	42.4%	16	16.2%	0	0%	99	100%
	Total	**7**	**1.9%**	**54**	**14.6%**	**139**	**37.6%**	**115**	**31.1%**	**37**	**10%**	**18**	**4.9%**	**370**	**100%**
Good use of community space	ES web	0	0%	3	2.3%	10	7.8%	26	20.3%	89	69.5%	0	0%	128	100%
	CM web	0	0%	0	0%	7	5%	49	34.8%	85	60.3%	0	0%	141	100%
	CM on site	0	0%	1	1%	3	3.1%	23	23.5%	69	70.4%	2	2%	98	100%
	Total	**0**	**0%**	**4**	**1.1%**	**20**	**5.4%**	**98**	**26.7%**	**243**	**66.2%**	**2**	**0.5%**	**367**	**100%**
Good place to bring children	ES web	2	1.6%	3	2.3%	19	14.7%	37	28.7%	60	46.5%	8	6.2%	129	100%
	CM web	2	1.4%	5	3.6%	15	10.7%	45	32.1%	69	49.3%	4	2.9%	140	100%
	CM on site	1	1%	3	3%	5	5.1%	27	27.3%	61	61.6%	2	2%	99	100%
	Total	**5**	**1.4%**	**11**	**3%**	**39**	**10.6%**	**109**	**29.6%**	**190**	**51.6%**	**14**	**3.8%**	**368**	**100%**

APPENDIX E: DATA TABLES FOR THE GROCERY STORE CUSTOMER SURVEY

Characteristics of Grocery Store survey respondents

Gender	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
Male	16	21.60%	33	33.3%	49	28.2%
Female	55	74.30%	67	66.7%	122	70.1%
Prefer not to answer	3	4.10%	0	0.0%	3	1.7%
Total	**74**	**100%**	**100**	**100%**	**174**	**100%**

Age	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
19 years or under	0	0.0%	0	0.0%	0	0.0%
20 to 29 years	10	13.5%	8	8.1%	18	10.4%
30 to 39 years	14	18.9%	8	8.1%	22	12.7%
40 to 49 years	11	14.9%	16	16.2%	27	15.6%
50 to 59 years	19	25.7%	26	26.3%	45	26.0%
60 years or older	16	21.6%	40	40.4%	56	32.4%
Prefer not to answer	4	5.4%	1	1.0%	5	2.9%
Total	**74**	**100%**	**99**	**100%**	**173**	**100%**

Highest level of education	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
Primary	0	0.0%	4	4.0%%	4	2.3%
Secondary/high school	10	13.3%	22	22.0%	32	18.3%
College/trade school	21	28.0%	31	31.0%	52	29.7%
University	40	53.3%	42	42.0%	82	46.9%
Prefer not to answer	4	5.3%	1	1.0%	5	2.9%
Total	**75**	**100%**	**100**	**100%**	**175**	**100.%**

What grocery store do you make most of your food purchases at?

Grocery store	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
George's Market	2	2.6%			2	1.1%
Maltese	1	1.3%			1	0.6%
Metro (no address provided)	23	29.5%			23	12.9%
Metro Arthur St			31	31.%	31	17.4%
Metro River St			39	39.%	39	21.9%
No Frills	7	9.0%			7	3.9%
Odena	2	2.6%			2	1.1%
Renco	6	7.7%			6	3.4%
Safeway	8	10.3%			8	4.5%
Scaf's Just Basics			30	30.%	30	16.9%
Superstore	26	33.3%			26	14.6%
Walmart	2	2.6%			2	1.1%
Westford foods	1	1.3%			1	0.6%
Total	**78**	**100%**	**100**	**100%**	**178**	**100%**

When did you start shopping at this grocery store?

Year started shopping at the Country Market	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
2017 (first year)	2	2.6%	3	3.0%	5	2.8%
2016	6	7.7%	1	1.0%	7	3.9%
2015	6	7.7%	5	5.0%	11	6.2%
3-4 years ago	11	14.1%	3	3.0%	14	7.9%
5-9 years ago	17	21.8%	10	10.0%	27	15.2%
10 or more years	36	46.2%	78	78.0%	114	64.0%
Total	**78**	**100%**	**100**	**100%**	**178**	**100%**

How often do you come to this grocery store?

Frequency of visits	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
First time visitor	0	0.0%	2	2.0%	2	1.1%
Rarely (1x per year)	0	0.0%	2	2.0%	2	1.1%
Occasionally (2-3x per year)	1	1.3%	3	3.0%	4	2.2%
Often (1x/month)	2	2.6%	5	5.0%	7	3.9%
Frequently (2-3x/month)	18	23.1%	7	7.0%	25	14.0%
Regularly (almost weekly)	57	73.1%	81	81.0%	138	77.5%
Total	**78**	**100%**	**100**	**100%**	**178**	**100%**

Do you purchase local food? (food produced within 100 km of Thunder Bay)

Purchase local food? (within 100km of Thunder Bay)	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
Yes	67	85.9%	86	86.0%	153	86.0%
No	6	7.7%	12	12.0%	18	10.1%
Don't know	5	6.4%	2	2.0%	7	3.9%
Total	**78**	**100%**	**100**	**100%**	**178**	**100%**

What motivates you to buy local food?

Motivations for buying local food	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
Food quality	54	80.6%	16	18.6%	70	45.8%
Food safety	24	35.8%	11	12.8%	35	22.9%
Nutritional value	26	38.8%	13	15.1%	39	25.5%
Price	13	19.4%	6	7.0%	19	12.4%
Environmental impact	37	55.2%	13	15.1%	50	32.7%
In season (freshness)	51	76.1%	39	45.3%	90	58.8%
Availability	29	43.3%	9	10.5%	38	24.8%
Grown or produced by someone you know	23	34.3%	9	10.5%	32	20.9%
Benefits to local economy	51	76.1%	42	48.8%	93	60.8%

Respondents were allowed to select more than one option.

How do you feel about paying for local food?

Feelings about paying for local food	EcoSuperior weblink		Grocery Store on site		Total	
	#	%	#	%	#	%
Pay less for local	1	1.5%	1	1.2%	2	1.3%
Pay the same	31	47.0%	28	32.6%	59	38.8%
Pay more for local	34	51.5%	57	66.3%	91	59.9%
Total	**66**	**100%**	**86**	**100%**	**152**	**100%**

There are a wide range of factors that people consider when buying food. How important are the following factors to you?

Importance of factors in buying food	Survey location	Not important		Somewhat important		Important		Very important		No opinion		Total	
		#	%	#	%	#	%	#	%	#	%	#	%
Food quality	Web	0	0.0%	2	2.6%	15	19.2%	61	78.2%	0	0.0%	78	100%
	On site	0	0.0%	2	2.0%	40	40.0%	58	58.0%	0	0.0%	100	100%
	Total	**0**	**0.0%**	**4**	**2.2%**	**55**	**30.9%**	**119**	**66.9%**	**0**	**0.0%**	**178**	**100%**
Food safety	Web	1	1.3%	0	0.0%	20	25.6%	57	73.1%	0	0.0%	78	100%
	On site	0	0.0%	9	9.0%	32	32.0%	59	59.0%	0	0.0%	100	100%
	Total	**1**	**0.6%**	**9**	**5.1%**	**52**	**29.2%**	**116**	**65.2%**	**0**	**0.0%**	**178**	**100%**
Nutritional value	Web	0	0.0%	2	2.6%	26	33.3%	50	64.1%	0	0.0%	78	100%
	On site	1	1.0%	7	7.0%	36	36.0%	56	56.0%	0	0.0%	100	100%
	Total	**1**	**0.6%**	**9**	**5.1%**	**62**	**34.8%**	**106**	**59.6%**	**0**	**0.0%**	**178**	**100%**
Price	Web	0	0.0%	15	19.2%	24	30.8%	39	50.0%	0	0.0%	78	100%
	On site	0	0.0%	22	22.0%	30	30.0%	48	48.0%	0	0.0%	100	100%
	Total	**0**	**0.0%**	**37**	**20.8%**	**54**	**30.3%**	**87**	**48.9%**	**0**	**0.0%**	**178**	**100%**
Environmental impact	Web	6	7.7%	19	24.4%	29	37.2%	22	28.2%	2	2.6%	78	100%
	On site	18	18.0%	24	24.0%	36	36.0%	21	21.0%	0	0.0%	100	100%
	Total	**24**	**13.6%**	**43**	**24.3%**	**65**	**36.7%**	**43**	**24.3%**	**2**	**1.1%**	**178**	**100%**
In season (freshness)	Web	1	1.3%	13	16.9%	32	41.6%	31	40.3%	0	0.0%	77	100%
	On site	6	6.0%	14	14.0%	39	39.0%	41	41.0%	0	0.0%	100	100%
	Total	**7**	**4.0%**	**27**	**15.3%**	**71**	**40.1%**	**72**	**40.7%**	**0**	**0.0%**	**177**	**100%**
Availability	Web	0	0.0%	13	16.9%	23	29.9%	40	51.9%	1	1.3%	77	100%
	On site	14	14.0%	17	17.0%	36	36.0%	33	33.0%	0	0.0%	100	100%
	Total	**14**	**7.9%**	**30**	**16.9%**	**59**	**33.3%**	**73**	**41.2%**	**1**	**0.6%**	**177**	**100%**
Grown or produced locally (within 100 km of Thunder Bay)	Web	11	14.1%	14	17.9%	26	33.3%	26	33.3%	1	1.3%	78	100%
	On site	10	10.0%	27	27.0%	39	39.0%	24	24.0%	0	0.0%	100	100%
	Total	**21**	**11.8%**	**41**	**23.0%**	**65**	**36.5%**	**50**	**28.1%**	**1**	**0.6%**	**178**	**100%**
Grown or produced in Ontario (not including locally)	Web	10	12.8%	17	21.8%	25	32.1%	25	32.1%	1	1.3%	78	100%
	On site	12	12.1%	16	16.2%	54	54.5%	17	17.2%	0	0.0%	99	100%
	Total	**22**	**12.4%**	**33**	**18.6%**	**79**	**44.6%**	**42**	**23.7%**	**1**	**0.6%**	**177**	**100%**
Grown or produced by someone you know	Web	29	37.2%	19	24.4%	8	10.3%	14	17.9%	8	10.3%	78	100%
	On site	56	56.0%	9	9.0%	16	16.0%	14	14.0%	5	5.0%	100	100%
	Total	**85**	**47.8%**	**28**	**15.7%**	**24**	**13.5%**	**28**	**15.7%**	**13**	**7.3%**	**178**	**100%**


Thunder Bay + Area
Food Strategy
Connecting Food and Community

THUNDER BAY + AREA FOOD + AGRICULTURE MARKET STUDY

OCTOBER 2017

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tbfoodstrategy.ca

This project was funded in part through *Growing Forward 2 (GF2)*, a federal-provincial-territorial initiative.
The Agricultural Adaptation Council assists in the delivery of *GF2* in Ontario.

Growing Forward 2

AAC agricultural adaptation council

Ontario

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