

# **A Snapshot of the Local Food System in Grey Bruce**

**Report by Kristine Hammel  
Grey Bruce Agriculture and Culinary Association**

**Completed with the financial assistance of the Federal Government through the  
Community Futures Rural Development Fund and the Bruce Community Futures  
Development Corporation**

## Table of Contents

<b><i>Introduction: The Local Food System in Grey Bruce &amp; Owen Sound</i></b> .....	<b>2</b>
<b>Agriculture in Grey and Bruce Counties</b> .....	<b>2</b>
<b>People in Grey, Bruce &amp; Owen Sound</b> .....	<b>2</b>
<b>Local Food in Grey Bruce</b> .....	<b>3</b>
<b>Distribution – A key challenge</b> .....	<b>3</b>
<b><i>Project Tasks and Methodology</i></b> .....	<b>4</b>
<b><i>Results</i></b> .....	<b>5</b>
<b>Response Rate</b> .....	<b>5</b>
<b>Operator Location and Classification</b> .....	<b>5</b>
<b>Growers</b> .....	<b>6</b>
<b>Processors</b> .....	<b>7</b>
<b>Grower Food Paths</b> .....	<b>9</b>
Frequency.....	9
Product Type .....	9
Mode of Transportation .....	10
<b>Processor Food Paths</b> .....	<b>10</b>
Frequency.....	11
Product Types.....	11
Mode of Transportation .....	12
<b>Retailers and Restaurants</b> .....	<b>12</b>
<b>All Food Paths</b> .....	<b>14</b>
<b>Respondents Comments</b> .....	<b>15</b>
<b>Potential Local Food Depot Sites</b> .....	<b>16</b>
<b>Total Distances Travelled</b> .....	<b>17</b>
<b>Estimating the Cost of Local Food Distribution in Grey Bruce</b> .....	<b>17</b>
<b><i>Conclusions</i></b> .....	<b>18</b>
<b><i>References and Further Reading</i></b> .....	<b>19</b>
<b><i>Appendix A. A Snapshot of the Local Food System in Grey Bruce</i></b> .....	<b>20</b>
<b><i>Appendix B. Local Food Paths: Growers to Processors</i></b> .....	<b>27</b>
<b><i>Appendix C. Local Food Paths: Growers to Retail</i></b> .....	<b>29</b>
<b><i>Appendix D. Local Food Paths: Suppliers to Processors</i></b> .....	<b>33</b>
<b><i>Appendix E. Local Food Paths: Processors to Retail</i></b> .....	<b>36</b>

## Introduction: The Local Food System in Grey Bruce & Owen Sound

### *Agriculture in Grey and Bruce Counties*

Agriculture in Grey Bruce involves almost 5000 farms and 7000 operators. The single largest sector is beef production, with 1946 farms representing 39% of total operations. The next largest group, consisting of 1400 farms (29%), does not fall into any of the defined categories of the Canadian Census. Oilseed and grain farming and dairy cattle account for an additional 890 farms (11% and 7% respectively). All other types of farming account for less than 5% of farms in total. See Table 1.

<b>County</b>	<b>Bruce</b>	<b>Grey</b>	<b>Total</b>	<b>Percent</b>
Dairy cattle and milk production	197	169	366	7%
Beef cattle ranching and farming	899	1047	1946	39%
Hog and pig farming	86	56	142	3%
Poultry and egg production	38	35	73	1%
Sheep and goat farming	80	131	211	4%
Oilseed and grain farming	400	123	523	11%
Vegetable and melon farming	22	24	46	1%
Fruit and tree-nut farming	12	83	95	2%
Green- house, nursery and floriculture production	27	75	102	2%
Other types	498	944	1442	29%
<b>Total</b>	<b>2259</b>	<b>2687</b>	<b>4946</b>	<b>100%</b>

*Table 1 Number of census farms classified by industry (OMAFRA, 2008)*

The average farm size in Grey County is 271 acres, together all census farms in the county cover a total of 613,156 acres and have average sales values per farm of \$99 480 (2006). The average farm size for Bruce County is 211 acres, together all census farms in the county cover a total of 567,212 acres and have average sales values per farm of \$149 850 (2006).

### *People in Grey, Bruce & Owen Sound*

The total population of Grey, Bruce and Owen Sound in 2006 was 157,760 (Statistics Canada, 2006), an increase of 3.1% over 2001. During the same time period, the provincial growth rate was 6.6%. The median income for the area in 2005 was \$61,549 per census family, which compares to a provincial median of \$69,156. The median age was 44.7, while the provincial median was 39.

## ***Local Food in Grey Bruce***

Data about the state of the local food system (e.g. volumes and types of food) in Grey Bruce is sparse. Some information can be derived from the Foodlink Grey Bruce web site (Grey Bruce Agriculture & Culinary Association, 2010). Currently (March 2010), the website lists a total of 326 operators, of which 161 are producers, 70 are processors, 67 are restaurants and bed & breakfasts, 43 are retailers and 9 are CSAs (community shared agriculture). Comparing the 4946 census farms to the 161 producers listed on Foodlink suggests that less than 5% of farmers are involved in direct marketing and the local food system.

The site also lists a total of 13 farmers markets, located in Collingwood, Durham, Flesherton & District, Holstein, Keady, Kincardine, Lions Head, Meaford, Owen Sound, Paisley, Walkerton, Wiarton and Williamsford. The majority of these markets are less than 10 years old.

The growth of the local food system and awareness of it is apparent in the formation of the **Grey Bruce Agriculture and Culinary Association (Grey Bruce ACA)** in 2007. The goals of the Grey Bruce ACA are (Grey Bruce Agriculture & Culinary Association, 2010):

1. Finding solutions to problems facing the local food system;
2. Increasing economic development opportunities for members and communities;
3. Developing agricultural and culinary tourism, marketing strategies, services and products to benefit the Grey Bruce region through membership involvement;
4. Education and awareness of the local food movement;
5. Supporting the development of infrastructure for easier distribution of local product.

The importance of agriculture to Grey and Bruce counties and the diverse opportunities of the local food movement are also reflected in the joint **Local Food Project (LFP)** initiated by the two counties in 2006 (Grey Bruce Agriculture & Culinary Association, 2010). Together with the Grey Bruce ACA, the LFP has produced the Foodlink Grey Bruce website, as well as carrying out diverse programs focused on gathering information about the local food system, assisting growers in meeting the demand for local food and marketing their products, initiating pilot programs with restaurants and institutions, and providing opportunities for members of the local food system to share their experiences.

## ***Distribution – A key challenge***

In 2009, the LFP hosted the first Local Food Summit in Elmwood. The event provided an opportunity for stakeholders within the local food system to come together to discuss common opportunities and barriers. Food distribution was identified as a major hurdle for the local food system, particularly because of the long distances, low population and low product volumes involved.

This project, “A Snapshot of the Local Food System in Grey Bruce”, gathered and consolidated information about the local food distribution system in Grey Bruce. It consolidated available information about producers, processors, retailers and distributors; traced the flow of local foods within and originating from the counties; and proposed sites for depots within a local food distribution system.

## Project Tasks and Methodology

1. *Consolidate data on local production (producers, products, volumes, location) for direct marketing.*

The Grey Bruce Agriculture and Culinary Map and the FoodLink Grey Bruce website were utilized to create a list of enterprises involved in the local food system. These information sources did not provide enough information to consistently identify the type of products produced by the enterprise nor the role(s) the enterprise plays in the local food system (grower, processor, retailer, and/or distributor).

2. *Collect data on the movement of local food within the counties and from the counties to major urban centers by surveying the local producers identified in Task 1 (origin, processing, destination, product type, volumes).*

The survey was carried out both on-line and by mail. All those enterprises with an e-mail address were sent e-mails with a link to the survey. Enterprises without e-mail addresses were sent a paper version of the survey along with addressed, stamped envelopes with which to return the survey.

The survey was developed on-line, using SurveyGizmo and then reformatted for the mail out. See Appendix A for the paper version. Before being sent out to all enterprises, it was tested on a small group and subsequently revised. The survey was available on-line for three weeks. Two reminders were sent out via e-mail, in addition to the initial invitation. Because the enterprises identified in Step 1 could not be classified, all enterprises were sent the survey and the survey included questions that related to growers, processors, distributors and retailers.

3. *Identify the paths and volumes of food flows (based on data from Task 2).*

The data from the survey was analyzed using Microsoft Excel.

4. *Identify potential sites for 'local food depots', based on the data collected in Tasks 2 & 3.*

Two factors were considered in order to identify potential sites for 'local food depots': (1) Using the food paths described by survey respondents, origins and destinations of paths could be identified. (2) Using the contact information and classification (grower, processor, distributor, and retailer/restaurant) provided by survey respondents, the locations of enterprises could be identified.

5. *Estimate the cost of local food distribution in Grey Bruce*

Using the data on food paths (origin, destination), the kilometres covered by the individual food paths were estimated using the Google maps function "Route Calculator". This information was combined with the data relating to the frequency of those paths, in order to estimate the total annual food kilometres of survey respondents. An estimate of the total annual local food kilometres in Grey Bruce could be made by assuming that the survey respondents and their food paths are representative of all enterprises. Two cost scenarios were then used to estimate the annual cost of local food distribution in Grey Bruce.

## Results

### *Response Rate*

A total of 335 operators were included in the survey. Of these, 265 received the survey invitation via e-mail and 70 via mail. Approximately 10% of the e-mail notifications were initially unsuccessful. These addresses were verified and corrected where possible and the survey invitation was resent. A total of 110 (33%) surveys were returned via mail (14) or submitted via the internet (96).

### *Operator Location and Classification*

Participants were asked to provide their contact information and to describe themselves as growers, processors, retailers/restaurants and/or distributors, choosing all classifications that applied to them. Because the terms were not defined in the survey, there may be some variation in how participants describe themselves – for example, some growers that engage in farm-gate sales and deliver their products to retailers described themselves as growers, distributors and retailers, while others that engage in the same activities described themselves simply as growers.

<b>Municipality</b>	<b>Grower</b>	<b>Processor</b>	<b>Distributor</b>	<b>Restaurant/ Retailer</b>	<b>Total</b>
Owen Sound	7	4	2	8	<b>21</b>
Grey Highlands	6	5	2	4	<b>17</b>
Meaford	7	3	2	5	<b>17</b>
Arran-Elderslie	6	4	1	5	<b>16</b>
Chatsworth	9	2		4	<b>15</b>
Blue Mountains	5	2	3	4	<b>14</b>
Hanover	3	4	1	4	<b>12</b>
Kincardine	4	2	2	2	<b>10</b>
South Bruce Peninsula	3	2		3	<b>8</b>
Huron-Kinloss	4	1	1	1	<b>7</b>
Saugeen Shores	2	2		3	<b>7</b>
West Grey	3	2		2	<b>7</b>
Brockton	4	1	1		<b>6</b>
Georgian Bluffs	2	2	1	1	<b>6</b>
Northern Bruce Peninsula	1	2		3	<b>6</b>
Southgate	1	1		1	<b>3</b>
South Bruce	2				<b>2</b>
<b>Total</b>	<b>70</b>	<b>41</b>	<b>17</b>	<b>52</b>	

*Table 2 Classification of survey respondents by location and activities. Individual enterprises could identify themselves in more than one category and therefore the totals exceeds the number of respondents*

The majority of participants described themselves as growers (70) and/or retailers (52). Owen Sound, Grey Highlands, Meaford, Arran-Elderslie and Chatsworth are home to the most respondents. See Table 2 and Figure 1.

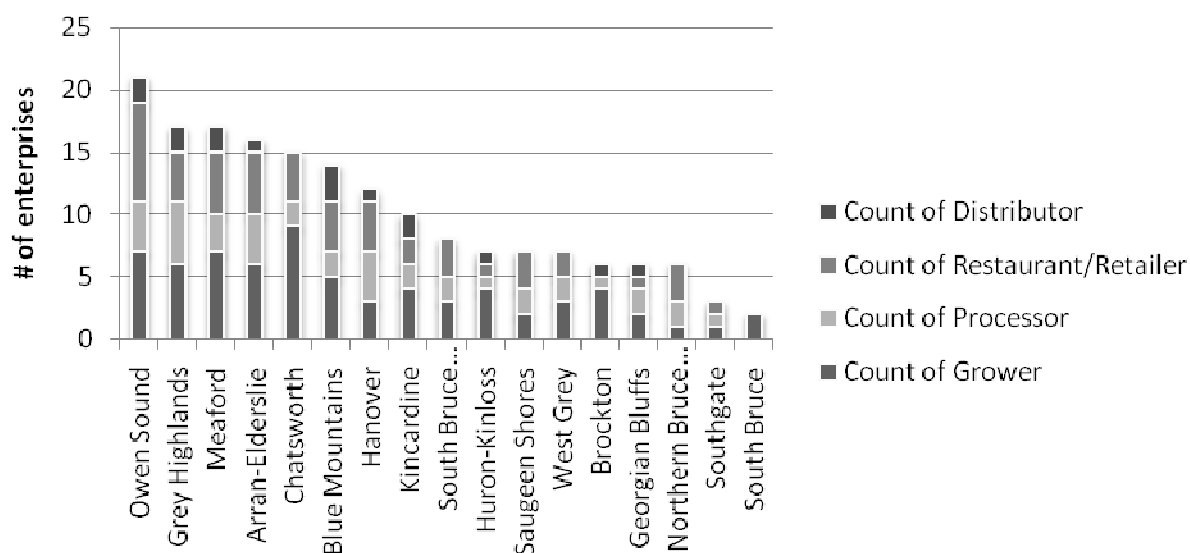


Figure 1 Municipalities and the number of survey respondents, categorized by their roles as distributors, restaurants/retailers, processors, and/or growers.

## Growers

The respondents that self-identified as growers produce a wide variety of foods. Fruit & vegetables, meat and honey & maple syrup are the most common product types. Preserves & condiments, baking & confectionaries and eggs are also common. Fish, dairy, grains & pulses & flour, oils and tea & coffee & herbs & spices are rarer. See Table 3.

Product Type	Number of Growers
Fruits & Vegetables	35
Meat	29
Fish	0
Eggs	9
Dairy	2
Baking & Confectionary	8
Honey & Maple Syrup	16
Preserves & Condiments	12
Grains & Pulses & Flour	2
Juice & Wine & Beer	2
Oils	1
Tea & Coffee & Herbs & Spices	2
Other	18

Table 3 The number of growers producing each type of product

<b>Municipality</b>	<b>Number of products</b>							<b>Total # of Growers</b>
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	
Arran-Elderslie	2	3			1			6
Blue Mountains	4					1		5
Brockton	1	2		1				4
Chatsworth	3	5	1					9
Georgian Bluffs		2						2
Grey Highlands	2	1	2		1			6
Hanover	1		2					3
Huron-Kinloss	1	1	1	1				4
Kincardine		1	2	1				4
Meaford	4	1		1			1	7
Northern Bruce Peninsula		1						1
Owen Sound	1	3	3					7
Saugeen Shores			2					2
South Bruce			2					2
South Bruce Peninsula			3					3
Southgate	1							1
West Grey	1		1		1			3

*Table 4 Number of growers per number of product types in each municipality*

Most growers (60) produce 3 or fewer product types. Those with more than 3 product types have a larger proportion producing fresh fruits & vegetables, frozen meat, baking & confectionary, and preserves & condiments than do those growers with less than 3 product types. See Table 4.

The majority of the growers involved in this study are located near Owen Sound (Meaford, Chatsworth, Owen Sound, Georgian Bluffs = 25), Hanover/Walkerton (West Grey, South Bruce, Brockton, Hanover = 12), the Beaver Valley (Grey Highlands, Blue Mountains = 11), Southampton/Port Elgin (Saugeen Shores, Arran-Elderslie, South Bruce Peninsula = 11), and Kincardine (Kincardine, Huron-Kinloss = 8).

### ***Processors***

The respondents that self-identified as processors work with a wide variety of local foods. Honey & maple syrup, frozen meat and baking & confectionary are the most common product types. Fresh meat, preserves & condiments, fresh fruits & vegetables, meat – sausages etc. and tea & coffee & herbs & spices are also widespread. See Table 5.

<b>Product Type</b>	<b>Number of Processors</b>
Fruits & Vegetables	6
Meat	8
Fish	1
Eggs	1
Dairy	2
Baking & Confectionary	8
Honey & Maple Syrup	10
Preserves & Condiments	6
Grains & Pulses & Flour	3
Juice & Wine & Beer	2
Oils	0
Tea & Coffee & Herbs & Spices	5
Other	12

*Table 5 The number of processors producing each type of product*

Most processors (29) produce 2 or fewer product types. Those with more than 2 product types have a greater proportion producing fruits & vegetables and meat, than do those with 2 or fewer products, who tend to produce honey & maple syrup, preservers & condiments and baking & confectionary. See Table 6.

<b>Municipality</b>	<b>Total number of product types</b>						<b>Total number of processors</b>
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>6</b>	<b>9</b>	
Arran-Elderslie	3	1					<b>4</b>
Blue Mountains	1			1			<b>2</b>
Brockton	1						<b>1</b>
Chatsworth		2	1				<b>3</b>
Georgian Bluffs	1	1					<b>2</b>
Grey Highlands	3	1			1		<b>5</b>
Hanover	2		2				<b>4</b>
Huron-Kinloss	1						<b>1</b>
Kincardine		1	1				<b>2</b>
Meaford	2						<b>2</b>
Northern Bruce Peninsula		1				1	<b>2</b>
Owen Sound	2	1	1				<b>4</b>
Saugeen Shores	1		1				<b>2</b>
South Bruce Peninsula	1	1					<b>2</b>
Southgate			1				<b>1</b>
West Grey	1	1					<b>2</b>
<b>Total</b>	<b>19</b>	<b>10</b>	<b>7</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>39</b>

*Table 6 The number of processors per number of product types in each municipality*

The majority of the processors involved in this study are located in or near Owen Sound (Meaford, Chatsworth, Owen Sound, Georgian Bluffs = 25), Southampton/Port Elgin (Saugeen Shores, Arran-Elderslie, South Bruce Peninsula = 8), the Beaver Valley (Grey Highlands, Blue Mountains = 7), and Hanover/Walkerton (Hanover, West Grey, Brockton, South Bruce = 7).

## ***Grower Food Paths***

A total of 101 food paths were described by growers. These paths involved meat, fruits & vegetables, eggs, honey & maple syrup, condiments & preserves. The paths occurred at daily, weekly, bi-weekly, monthly, quarterly, semi-annual, annual and other frequencies. While most growers described themselves as the mode of transportation (“I Deliver”), some also indicated the involvement of transport companies or courier services. Volumes ranged from just a few kilograms to several tonnes (detailed information relating to volumes of grower food paths can be found in Appendix B. Local Food Paths: Growers to Processors and Appendix C. Local Food Paths: Growers to Retail). Though the majority of destinations were within Grey Bruce, growers also venture outside of the region, both to process and retail their products.

## **Frequency**

Almost 60% of paths described by growers occur on a weekly, biweekly or monthly basis. Daily, quarterly, semi-annually and annual frequencies are rarer, on average they account for just 5% of all trips each. See Table 7.

<b>Frequency of delivery</b>	<b>Percentage of Paths</b>
Daily	6%
Weekly	27%
Bi-weekly	14%
Monthly	17%
Quarterly	5%
Semi-annually	4%
Annually	5%
Other	18%
N/A	5%

*Table 7 Frequency of food paths described by growers*

## **Product Type**

Almost 60% of paths between growers and processors involve livestock, whereas the paths to retailers involve meat only 20% of the time. Paths to retailers are dominated by honey & maple syrup (35%) and fruits & vegetables (30%). More than half of all trips to retailers (fruits & vegetables, meat, eggs) require some sort of refrigeration to ensure food safety and/or maintain product quality. See Table 8.

Product type	To Processing		To Retail	
	Number of trips	Percent of Trips	Number of trips	Percent of Trips
Eggs	3	7%	4	7%
Fruits & Vegetables	12	29%	18	30%
Honey & Maple Syrup	2	5%	21	35%
Livestock/Meat	24	59%	8	20%
Other			3	5%
Preserves & Condiments			2	3%

*Table 8 The product types involved in the food paths described by growers*

### **Mode of Transportation**

For the majority of food paths described by growers, the growers themselves deliver the product. In the cases where a transport company is used, more than half involve the shipment of fruits and vegetables or meat to the GTA and the Region of Waterloo. Paths that involve transport companies within Grey Bruce relate to eggs shipped to Hanover and apples in the Meaford/Thornbury area. Only a handful of growers indicated that they partner with other growers to ship their product. See Table 9.

How does the product get there	Percentage of paths
Courier	1%
I deliver	71%
Other	7%
Transport Company	12%
No answer	9%

*Table 9 Transportation types used by growers*

### **Processor Food Paths**

A total of 102 food and supply paths were described by processors. These paths involved baking & confectionary, fruits & vegetables, dairy products, grain & pulses & flour, honey & maple syrup, juice & wine & beer, meat, preserves & condiments, tea & coffee & herbs & spice and a diverse array of supplies (packaging, livestock, and ingredients). The paths occurred at daily, weekly, bi-weekly, monthly, quarterly, semi-annual and other frequencies. While most growers described themselves as the mode of transportation (“I Deliver”), some also indicated the involvement of transport companies, courier services or other arrangements. Volumes ranged from just a few kilograms to entire truck loads (detailed information relating to volumes of processor food paths can be found in Appendix D. Local Food Paths: Suppliers to Processors and Appendix E. Local Food Paths: Processors to Retail). Though the majority of destinations were within Grey Bruce, processors also venture outside of the region, both to get supplies and to

retail their products.

## Frequency

Almost 80% of paths described by processors occur on a weekly, biweekly, monthly or quarterly basis. Daily food paths are quite rare, representing just 5% of the total. Annual and semi-annual frequencies are also rare, together accounting for about 11% of all paths. See Table 10.

Frequency of delivery	Percentage of Paths
Daily	5%
Weekly	34%
Bi-weekly	19%
Monthly	14%
Quarterly	12%
Semi-annually	2%
Annually	9%
Other	6%

*Table 10 Frequency of food paths described by processors*

## Product Types

The majority of food paths between processors and their suppliers involve food items, while packaging and equipment of various types make up about one quarter of these paths. See Table 11.

Item Type	Number of Paths	Percent of Paths
Food	30	64%
Livestock	5	11%
Packaging/Equipment	12	26%

*Table 11 Product types involved in food paths described by processors – for those paths that originate with suppliers*

No single product type dominates the paths between processors and retailers. Almost one third (dairy, fruits & vegetables, meat) require some type of refrigeration to ensure food safety and/or maintain product quality. See Table 12.

Product type	Number of trips	Percent of Trips
Baking & Confectionary	3	6%
Dairy – refrigerated	5	10%
Fruits & Vegetables – Fresh	5	10%
Grains & Pulses & Flour	1	2%
Honey & Maple Syrup	6	12%
Juice & Wine & Beer	8	15%
Meat – fresh	5	10%
Other	2	4%
Preserves & Condiments	5	10%
Tea & Coffee & Herbs & Spices	12	23%

*Table 12 The types of products involved in the food paths described by processors – for those paths that originate with the processor*

## Mode of Transportation

The majority of food paths described by the processors are undertaken by the processors themselves (73%). Less than 15% are undertaken by couriers or transport companies. Table 13.

How does the product get there	Percentage of paths
Courier	5%
I deliver	73%
Other	11%
Transport Company	9%
No answer	3%

Table 13 The types of transportation involved in the food paths described by processors

## Retailers and Restaurants

A total of 31 enterprises self-identified as a retailer or restaurant. Approximately half of these are retailers and the other half are restaurants or cafes. On average, each works with 8 local suppliers, with some having no local suppliers (they process products that are imported or they retail their own products) and one having 72 suppliers. Retailers work with an average of 11 local suppliers, while restaurants work with an average of 6.

Restaurants and retail outlets that provide local food are located throughout Grey and Bruce counties, with Owen Sound and Arran-Elderslie having the most outlets (8 and 7 respectively). See Figure 2.

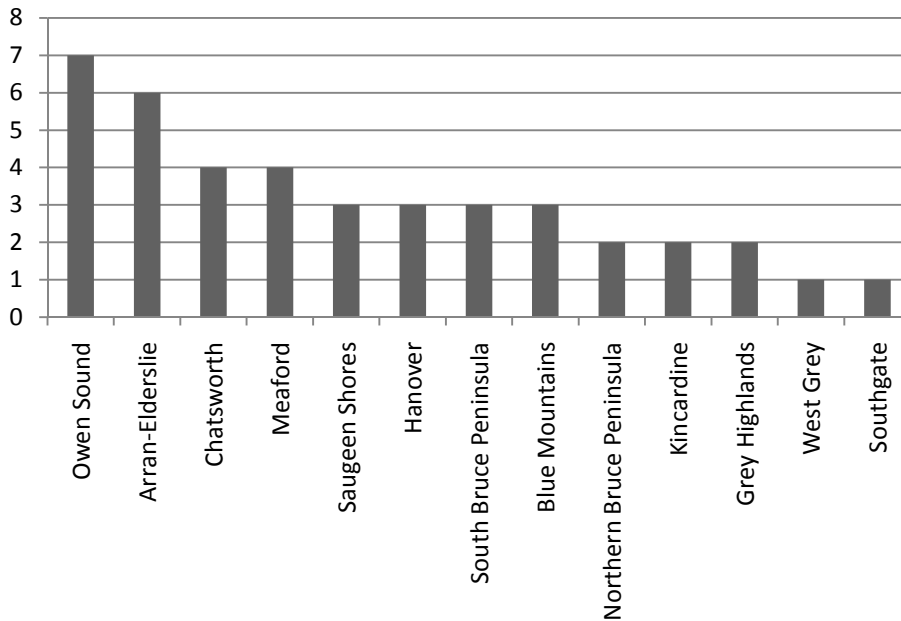


Figure 2 The number of retailers and restaurants that offer local food, per municipality

The local products most widely available at retailers and restaurants in Grey Bruce are maple syrup & honey, fresh fruits & vegetables and fresh meat. At the other end, the products least available are frozen products, specifically fruits & vegetables, fish and dairy. Juice & wine & beer are also more difficult to find. See Figure 3.

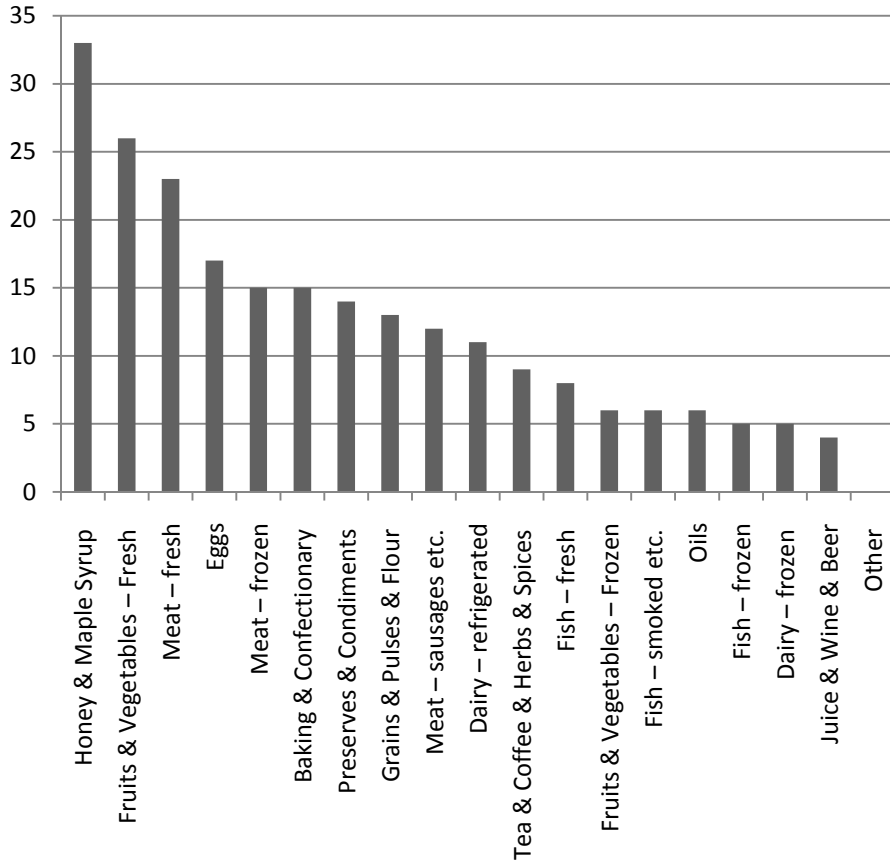


Figure 3 The number of retailers and restaurants at which each product type is available

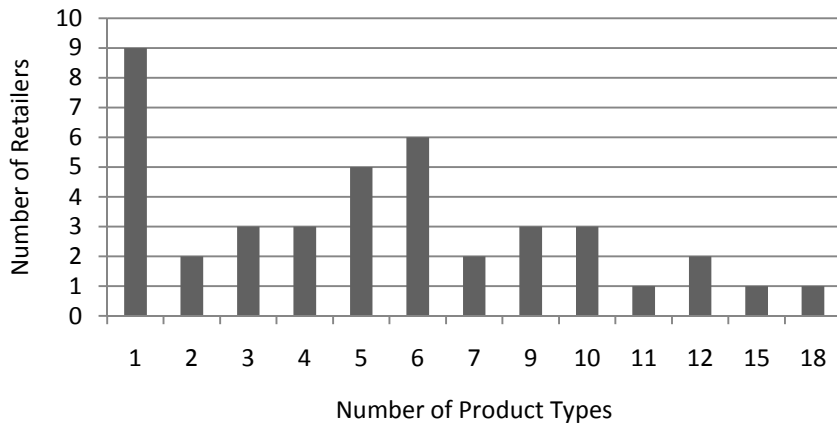


Figure 4 The number of product types available at each retailer/restaurant

Most retailers and restaurants currently carry a limited palette of local product types. Approximately one third of retailers/restaurants report having just one type of product and just one retailer reports carrying all 18 different product type categories used in the survey. On average, retailers and restaurants carry 6 local product types. See Figure 4.

### ***All Food Paths***

Owen Sound is both the most common origin and destination of local food paths in Grey Bruce. The GTA also plays an important role in terms of both origins (3<sup>rd</sup>) and destinations (tied for 1<sup>st</sup>). Hanover, Arran-Elderslie and West Grey round out the top five in terms of local food origins, while Kincardine, the Grey Highlands and the Blue Mountains round out the top five for destinations. See Table 14 and Figure 5.

<b>Municipality</b>	<b>Origin</b>	<b>Municipality</b>	<b>Destination</b>
Owen Sound	34	Owen Sound	18
Hanover	18	GTA	18
GTA	13	Kincardine	15
Arran-Elderslie	12	Grey Highlands	13
West Grey	12	Blue Mountains	11
Kincardine	11	Arran-Elderslie	10
Chatsworth	10	West Grey	10
Grey Highlands	10	Chatsworth	9
Huron-Kinloss	10	South Bruce Peninsula	8
South Bruce Peninsula	10	Saugeen Shores	8

*Table 14 Top ten municipalities in terms of the origins and destinations of food paths*

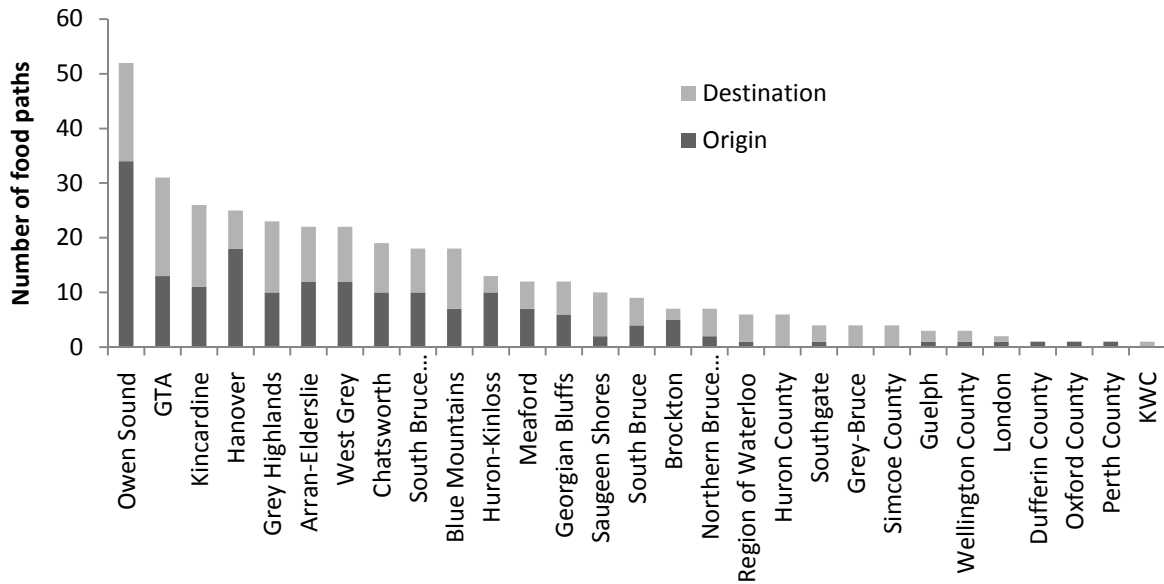


Figure 5 The number of food paths that originate and terminate in each municipality

## Respondents' Comments

In addition to the specific comments about food paths, survey participants were also asked to share their thoughts on local food distribution in general, and the opportunities and barriers they see for the sector.

When asked for comments on the local food distribution system in general, many respondents (21) articulated the need for better distribution options than currently available and the inefficiency of individual delivery. Most survey respondents talked about the need for some sort of local food distribution – such comments came from a variety of perspectives. Growers and processors spoke of the great deal of time and effort required to move their products, while restaurants spoke of the difficulty in sourcing local products and their inability to pick-up all the individual items themselves. Several (4) also expressed interest in the formation of a cooperative to achieve this and one indicated that a group of growers is working to create a produce auction. Only two respondents felt that there is no need for more distribution. Several also expressed concern about the small market available in Grey Bruce, our low population numbers, the seasonality of some products and low volumes.

In addition, the respondents spoke of other important factors that help determine the success of local food distribution – consistency and quality of the products, communication, coordination of supply and demand, and the need for processing and storage facilities. Specifically, respondents identified a variety of needs, including a larger, central farmers' market, a central processing kitchen, a local food terminal, warehouses, and refrigerated transportation. Others discussed organizational matters, such as the need to connect supply and demand, the idea of a local marketing board, and the large amount of effort and time required for marketing. The

importance of consistent quality was also voiced by a respondent, as was the need for capital. Concern was also raised about the lack of government support for processors.

And, while one respondent felt that more demand for local products is needed, another indicated that sales have increased in recent years and another praised the Grey Bruce ACA map.

When asked to describe the opportunities related to local food distribution in Grey Bruce, many spoke about both the status quo and what elements would create opportunity. Respondents cited the growing awareness and/or demand for local products as a major opportunity. At the same time, the variety of products, great farms, great products and increasing supply in Grey Bruce were also highlighted as major opportunities. Several respondents felt that centralized distribution and marketing would create opportunity, while others wrote about on-farm and small-scale processing as a source of opportunity.

At the same time, respondents described a wide array of barriers to local food distribution in Grey Bruce. Many cited the large area, low population and low volume as a barrier to local food distribution. The lack of joint distribution and marketing was also described. Price issues, both the pricing practices of mainstream grocery stores and the higher prices of local products were described. Another concern revolved around the seasonality of products, with a focus on fruits and vegetables. It was felt that this seasonality is a hindrance to developing distribution systems. The lack of several things was another concern – capital, coordination (among producers and between supply and demand), and storage are needed.

### ***Potential Local Food Depot Sites***

The top five locations with regard to food path origins and destinations are Owen Sound, Hanover, Arran-Elderslie, West Grey, and Kincardine (origins), and Owen Sound, Kincardine, Grey Highlands, Blue Mountains and Arran-Elderslie (destinations), see Table 14.

The top five municipalities, with regard to the locations of local food enterprises (grower, processor, distributor, retailer/restaurant), are Owen Sound, Grey Highlands, Meaford, Arran-Elderslie and Chatsworth, see Table 2.

<b>Origins</b>	<b>Points</b>	<b>Destinations</b>	<b>Points</b>	<b># of Respondents</b>	<b>Points</b>
Owen Sound	5	Owen Sound	5	Owen Sound	5
Hanover	4	Kincardine	4	Grey Highlands	4
Arran-Elderslie	3	Grey Highlands	3	Meaford	3
West Grey	2	Blue Mountains	2	Arran-Elderslie	2
Kincardine	1	Arran-Elderslie	1	Chatsworth	1

*Table 15 Candidate municipalities for local food depots, with a simple rating (1<sup>st</sup> place = 5 points, 5<sup>th</sup> place = 1 point)*

By combining all three factors we can rate the municipalities by their total points. Thus, Owen Sound is the highest rated candidate municipality with 15 points, followed by Grey Highlands

with 7, Arran-Elderslie with 6, Kincardine with 5, and Hanover with 4.

### ***Total Distances Travelled***

All food paths with sufficient origin, destination and frequency information were included in the estimate of the total annual distance covered by the food paths described in this survey. It was found that just two paths account for 18% of the total annual kilometres. These two paths involve daily trips to Toronto. Because these two paths appear to operate within the larger food system, rather than the local Grey Bruce food system, they were removed from the analysis. It was then found that the food paths described by survey respondents amount to approximately 534 926 km annually. The majority of paths (77%) and kilometres (65%) are undertaken by the producers and processors themselves. Couriers and transport companies tend to be used for longer paths (average food path lengths of 154 km and 142 km respectively, in comparison to 57 km for those trips in which the respondent delivers). The use of couriers and transport companies only accounts for 11% of food paths and 25% of total kilometres. See Table 16.

<b>Delivery Method</b>	<b># of food paths</b>	<b>% of food paths</b>	<b>Annual km</b>	<b>% of annual km</b>
I deliver	135	77%	346 478	65%
Courier	3	2%	17 328	3%
Transport company	16	9%	115 580	22%
Other	14	8%	41 380	8%
N/A	8	5%	14 160	3%
<b>Total</b>	<b>176</b>		<b>534 926</b>	

*Table 16 Number of food paths and total annual kilometers per transportation method*

### ***Estimating the Cost of Local Food Distribution in Grey Bruce***

The approximate annual cost of the food paths described by respondents can be estimated by multiplying their total annual kilometres by the cost per kilometre. The cost per kilometre was estimate to be \$0.50/km, based on mileage rates commonly paid in the area. Thus, the total cost for the food paths described in this survey is estimate to be \$267,463.00.

In order to extrapolate these figures to Grey Bruce local food distribution as a whole, it must first be estimated what portion of total food paths is represented by the survey data. Eighty-five per cent of survey respondents provided complete data for their food paths (for others data was missing) and the total number of survey respondents represent about one third of all local food system agents<sup>1</sup>. The survey therefore represents approximately 28% of Grey Bruce local food distribution.

<sup>1</sup> Based on the response rate of the survey (110) in comparison to the list (335) generated using the Grey Bruce Foodlink website and the Grey Bruce Agriculture and Culinary Association Map.

If we assume that the food paths described in this survey are representative of the others, then we can now estimate the total food kilometres and the costs involved for the Grey Bruce local food system. Total Grey Bruce food kilometres would thus be 1 910 450 km and the total cost, based on a cost of \$0.50/km, would be \$955 225.

<b>Cost per km</b>	\$0.50/km
<b>Total km described in survey</b>	534 926km
<b>Estimated cost per year for survey respondents</b>	\$267,463.00
<b>Estimated total km for Grey Bruce</b>	1 910 450 km
<b>Estimated cost per year for Grey Bruce local food distribution</b>	\$955 225

*Table 17 Cost estimate of the food paths described by survey respondents and all the food paths in the Grey Bruce local food system*

## Conclusions

The rise of interest in and demand for local food is seen by many survey respondents as an important opportunity. Grey Bruce is felt to be particularly well-suited to meet this demand because of the great diversity of local agricultural products. However, the current distribution system can best be characterized as ‘every man for himself’, with most growers and processors spending significant time on the road, delivering their products. This is recognized by many as a major barrier to the growth of the local food system and their business. The need for some type of distribution system(s) is widely recognized and demand is growing.

Local food distribution is not only a challenge in Grey Bruce. Throughout Ontario and North America, growers and processors are facing similar challenges. And they are developing a wide variety of models to address the issues. These range from grower cooperatives, through produce auctions to private marketing, processing and distribution enterprises. More information can be found in the following reports (both available on-line):

Taking Back the Middle: Local and Organic Producer-Controlled Distribution Systems. T. Schumilas. Canadian Organic Growers Perth Waterloo Wellington. 2009.

Scaling Up: Meeting the Demand for Local Food. Lindsey Day-Farnsworth, Brent McCown, Michelle Miller, Anne Pfeiffer. UW-Extension Ag Innovation Center and UW-Madison Center for Integrated Agricultural Systems. 2009.

## References

*Foodlink Grey Bruce*. (n.d.). Retrieved March 15, 2010, from [www.foodlinkgreybruce.com](http://www.foodlinkgreybruce.com)

*OMAFRA*. (2006). Retrieved March 15, 2010, from OMAFRA :  
<http://www.omafra.gov.on.ca/english/stats/census/>

*Statistics Canada*. (n.d.). Retrieved March 15, 2010, from <http://www12.statcan.ca/census-recensement/2006/dp-pd/prof/92-591/details/page.cfm?Lang=E&Geo1=HR&Code1=3533&Geo2=PR&Code2=35&Data=Count&SearchText=Grey%20Bruce%20Health%20Unit&SearchType=Begins&SearchPR=01&B1=Al1&GeoLevel=&GeoCode=3533>

# Appendix A. A Snapshot of the Local Food System in Grey Bruce

=====  
**Introduction**  
=====

At the Grey Bruce Local Food Summit in November 2009, distribution was identified as a major hurdle to the development of our local food system. The lack of a local food distribution system means that many growers and processors are travelling long distances with relatively small quantities of goods -- an expensive and inefficient situation.

The Grey Bruce Agriculture and Culinary Association has received funding from the Bruce Community Futures Development Corporation to carry out a study of our local food distribution system. This survey is part of that study. Its purpose is to gather information about the movement of products within and originating from Grey Bruce -- origins, destinations, types of products, volumes and frequencies.

This is a first step in the process of improving our distribution system. Your contribution is very valuable!

Please complete the survey as soon as possible and return it using the enclosed envelope.

You can also complete this survey on-line using the link below:

<http://www.surveygizmo.com/s/239399/a-snapshot-of-the-local-food-system-in-grey-bruce>

=====  
Your contact information  
=====

First Name \_\_\_\_\_

Last Name \_\_\_\_\_

Business Name \_\_\_\_\_

Postal Address \_\_\_\_\_

Physical Address \_\_\_\_\_

City \_\_\_\_\_

Postal Code \_\_\_\_\_

Email Address \_\_\_\_\_

Phone Number \_\_\_\_\_

**Are you a ... ?**

*Please check all that apply.*

- Grower
- Processor
- Retailer/Restaurant
- Distributor

=====  
**Growers: Products**  
=====

My products...

=====  
**Processors: Products**  
=====

- Fruits & Vegetables – Fresh
- Fruits & Vegetables – Frozen
- Meat – fresh
- Meat – frozen
- Meat – sausages etc.
- Fish – fresh
- Fish – frozen
- Fish – smoked etc.
- Eggs
- Dairy – refrigerated
- Dairy – frozen
- Baking & Confectionary
- Honey & Maple Syrup
- Preserves & Condiments
- Grains & Pulses & Flour
- Juice & Wine & Beer
- Oils
- Tea & Coffee & Herbs & Spices
- Other \_\_\_\_\_

**My products...**

- Fruits & Vegetables – Fresh
- Fruits & Vegetables – Frozen
- Meat – fresh
- Meat – frozen
- Meat – sausages etc.
- Fish – fresh
- Fish – frozen
- Fish – smoked etc.
- Eggs
- Dairy – refrigerated
- Dairy – frozen
- Baking & Confectionary
- Honey & Maple Syrup
- Preserves & Condiments
- Grains & Pulses & Flour
- Juice & Wine & Beer
- Oils
- Tea & Coffee & Herbs & Spices
- Other \_\_\_\_\_

**Are your processing facilities available to rent to other processors?**

- Yes. What facilities are available?

\_\_\_\_\_

- No

**Do you do custom work?**

- Yes. What services do you offer?

\_\_\_\_\_

- No

=====

**Growers: Moving your products**

=====

Please describe how you get your products to processors

Processor name	Processor location	Product type Fruits & Vegetables, Meat, Fish, Eggs, Dairy , Honey & Maple Syrup, Grains & Pulses, Other	How does the product get there I deliver Mail/Courier Transport company Other	Average volume per trip	Volume unit e.g cow, bushel	Frequency of delivery Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually, Other	After processing...		
							Back to farm, farmgate sales	Back to farm, then to retailer	Direct to the retailer
1									
2									
3									
4									
5									
6									

Please describe how you get your products (processed and unprocessed) to retailers

*Farmers markets aren't included in this survey because growers usually have to be there themselves. Please also include retailers outside of Grey Bruce.*

Retailer name	Retailer location	Product type Fruits & Vegetables – Fresh, Fruits & Vegetables – Frozen, Meat – fresh, Meat – frozen, Meat – sausages etc., Fish – fresh, Fish – frozen, Fish – smoked etc., Eggs, Dairy – refrigerated, Dairy – frozen, Baking & Confectionary, Honey & Maple Syrup, Preserves & Condiments, Grains & Pulses & Flour, Juice & Wine & Beer, Oils, Tea & Coffee & Herbs & Spices, Other	How does the product get there I deliver Mail/Courier Transport company Other	Average volume per trip	Volume unit e.g cow, bushel	Frequency of delivery Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually, Other
2						
3						
4						
5						
6						
7						
8						

=====  
**Processors: Moving your supplies and products**  
 =====

**Processors: Please describe how you get products from your suppliers**

*Please also include any suppliers located outside of Grey Bruce.*

Supplier name	Supplier location	Item type	How is it transported I deliver Mail/Courier Transport company Other	Average volume	Volume unit	Frequency Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually, Other
1						
2						
3						
4						
5						
6						

**Processors: Please describe how you get your products to retailers**

*Please also include retailers outside Grey Bruce.*

Supplier name	Supplier location	Item type	How is it transported I deliver Mail/Courier Transport company Other	Average volume	Volume unit	Frequency Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually, Other	Seasonal customer Spring, Summer Fall, Winter
1							
2							
3							
4							
5							
6							
7							
8							

=====

**Retailers**

=====

**With how many local (Grey Bruce) suppliers do you work?**

---

**What product types do you source locally?**

- Fruits & Vegetables – Fresh
- Fruits & Vegetables – Frozen
- Meat – fresh
- Meat – frozen
- Meat – sausages etc.
- Fish – fresh
- Fish – frozen
- Fish – smoked etc.
- Eggs
- Dairy – refrigerated
- Dairy – frozen
- Baking & Confectionary
- Honey & Maple Syrup
- Preserves & Condiments
- Grains & Pulses & Flour
- Juice & Wine & Beer
- Oils
- Tea & Coffee & Herbs & Spices
- Other \_\_\_\_\_

**What local products do your customers ask for, for which you are not able to find local suppliers?**

- Fruits & Vegetables – Fresh
- Fruits & Vegetables – Frozen
- Meat – fresh
- Meat – frozen
- Meat – sausages etc.
- Fish – fresh
- Fish – frozen
- Fish – smoked etc.
- Eggs
- Dairy – refrigerated
- Dairy – frozen
- Baking & Confectionary
- Honey & Maple Syrup
- Preserves & Condiments
- Grains & Pulses & Flour
- Juice & Wine & Beer
- Oils
- Tea & Coffee & Herbs & Spices
- Other \_\_\_\_\_

=====

**Distributors**

=====

With how many local (Grey Bruce) buyers do you work? \_\_\_\_\_

With how many local (Grey Bruce) suppliers do you work?  
\_\_\_\_\_

**With what types of products do you work?**

- Fruits & Vegetables – Fresh
- Fruits & Vegetables – Frozen
- Meat – fresh
- Meat – frozen
- Meat – sausages etc.
- Fish – fresh
- Fish – frozen
- Fish – smoked etc.
- Eggs
- Dairy – refrigerated
- Dairy – frozen
- Baking & Confectionary
- Honey & Maple Syrup
- Preserves & Condiments
- Grains & Pulses & Flour
- Juice & Wine & Beer
- Oils
- Tea & Coffee & Herbs & Spices
- Other \_\_\_\_\_

**What types of products are buyers asking for, for which you have not been able to find local suppliers?**

	Product type	Supply Problems			Comments
		Quantity	Quality	Consistency	
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

=====

**Comments**

=====

**Your comments and ideas about local food distribution?**

**What opportunities and barriers/challenges do you see for local food in Grey Bruce?**  
*Opportunities* *Barriers/challenges*

**Any other thoughts about this survey or local food issues in general?**

=====  
**Thank you for taking the time to complete this survey!**  
=====

**If you had any problems with the survey or have any other feedback, please get in touch:**

Kristine Hammel  
R.R. # 3  
Allenford ON  
N0H 1A0  
519 935 0816  
kristine.hammel@gmail.com

**The results of this survey will be available through the Grey Bruce Agriculture and Culinary Association in April.**

You can contact the Grey Bruce ACA via:  
Grey Bruce ACA  
Box 209, Ripley  
Ontario, N0G 2R0  
1 888-396-4591  
E-mail: [info@greybruceaca.com](mailto:info@greybruceaca.com)  
<http://www.foodlinkgreybruce.com/>

## Appendix B. Local Food Paths: Growers to Processors

Origin	Destination	Product type	How does the product get there	Average volume per trip	Volume unit	Frequency of delivery
Kincardine	Kincardine	Fruits & Vegetables	I deliver	N/A		Daily
Kincardine	Kincardine	Honey & Maple Syrup	I deliver	5	case (12@1kg)	Bi-weekly
Meaford	Blue Mountains	Fruits & Vegetables	Transport Company	72	1440 bushels	Monthly
Meaford	GTA	Fruits & Vegetables	Transport Company	72	Bins/1440 bushels	Bi-weekly
Blue Mountains	Blue Mountains	Fruits & Vegetables	I deliver	5	Bins	Daily
Arran-Elderslie	South Bruce	Meat	I deliver	2	lambs	Semi-annually
Owen Sound	Huron County	Meat	I deliver	150	birds	Annually
Owen Sound	Owen Sound	Eggs	#N/A	25	Dozen	Weekly
Meaford	South Bruce	Meat	I deliver	4	sheep	Monthly
Hanover	Hanover	Eggs	I deliver	2.5	cases	Daily
Brockton	Hanover	Eggs	Transport Company	2000	doz	Weekly
Chatsworth	Hanover	Meat	Other	2	cow	Quarterly
West Grey	West Grey	Fruits & Vegetables	Other	small		Weekly
Owen Sound	Blue Mountains	Fruits & Vegetables	#N/A	22	Bin (850 lb)	Weekly
Owen Sound	Blue Mountains	Fruits & Vegetables	Transport Company	22	Bin (850 lb)	Weekly
Owen Sound	Simcoe County	Meat	I deliver	50	20lbs (turkey)	Annually
Owen Sound	Southgate	Meat	I deliver	100	8lbs (chicken)	Annually
Owen Sound	Simcoe County	Meat	I deliver	3	200lbs (pig)	Monthly
Owen Sound	Simcoe County	Meat	I deliver	5	100lbs (lamb)	Bi-weekly
Owen Sound	Simcoe County	Meat	I deliver	1	1000lbs (beef)	Bi-weekly
Chatsworth	Chatsworth	Honey & Maple	I deliver	variable	variable	Annually

Syrup						
South Bruce	South Bruce	Meat	#N/A	15		Other
South Bruce	South Bruce	Meat	#N/A	10		Other
South Bruce	Kincardine	Meat	#N/A	5		Other
Meaford	Blue Mountains	Fruits & Vegetables	I deliver	16	Bin (850 lb)	Weekly
Huron-Kinloss	Region of Waterloo	Fruits & Vegetables	Transport Company	20	Bin/skid	Weekly
Arran-Elderslie	Kincardine	Meat	I deliver	2	steers	Quarterly
Huron-Kinloss	Kincardine	Meat	I deliver	varies	pig	Other
Brockton	South Bruce	Meat	I deliver	4	lambs	Weekly
Northern Bruce Peninsula	Huron County	Meat	I deliver	2	heifer	Other
Owen Sound	Huron County	Meat	I deliver	100		Bi-weekly
Kincardine	Kincardine	Meat	I deliver	1	cattle	Other
Huron-Kinloss	Region of Waterloo	Fruits & Vegetables	I deliver	75	bushels	Other
Arran-Elderslie	Huron County	Meat	I deliver	125	cickens	Other
Huron-Kinloss	Huron-Kinloss	Meat	I deliver	varies	pig	Other
Hanover	KWC	Fruits & Vegetables	I deliver	1000 - 1500	lbs	Weekly
Saugeen Shores	Kincardine	Meat	I deliver	4	cattle	Monthly
South Bruce Peninsula	Georgian Bluffs	Meat	I deliver	1	bison	Monthly
Grey Highlands	Huron County	Meat	I deliver	100	birds	Semi-annually
Blue Mountains	Blue Mountains	Fruits & Vegetables	I deliver	10	Bins	Monthly
West Grey	Hanover	Meat	I deliver	2	cattle	Weekly

## Appendix C. Local Food Paths: Growers to Retail

Origin	Destination	Product type	How does the product get there	Average volume per trip	Volume unit	Frequency of delivery
Chatsworth	Chatsworth	Honey & Maple Syrup	I deliver	24	kg	Quarterly
Chatsworth	Meaford	Honey & Maple Syrup	I deliver	60	kg	Other
Owen Sound	#N/A	Fruits & Vegetables – Fresh	#N/A			#N/A
Meaford	GTA	#N/A	#N/A			#N/A
Grey Highlands	Blue Mountains	Other	I deliver	140	boxes (11b)	Weekly
Hanover	Hanover	Eggs	I deliver	16	cases	Weekly
Blue Mountains	GTA	Fruits & Vegetables – Fresh	Transport Company	1	Skid	Daily
Chatsworth	Owen Sound	Honey & Maple Syrup	I deliver	24	kg	Monthly
Blue Mountains	Blue Mountains	Fruits & Vegetables – Fresh	Transport Company	60	Bins	Weekly
Meaford	GTA	Meat – fresh	Transport Company	5	carcasses	Bi-weekly
Brockton	Saugeen Shores	Honey & Maple Syrup	I deliver	varies greatly	several sizes	Monthly
Chatsworth	Chatsworth	Honey & Maple Syrup	I deliver	24	kg	Other
Hanover	Hanover	Eggs	Other	20	Dozen	Daily
Arran-Elderslie	GTA	Fruits & Vegetables – Fresh	I deliver	40	vegetable package	Weekly
Chatsworth	Chatsworth	Honey & Maple Syrup	I deliver	12	kg	Bi-weekly
West Grey	West Grey	Fruits & Vegetables – Fresh	I deliver	50	lbs	Weekly
Chatsworth	Owen Sound	Honey & Maple Syrup	I deliver	24	kg	Monthly
Brockton	Owen Sound	Honey & Maple Syrup	I deliver	14	250 ml	Other
Chatsworth	Owen	Honey &	I deliver	15	kg	Bi-weekly

	Sound	Maple Syrup			
Owen Sound	Owen Sound	Meat – fresh	I deliver		Bi-weekly
Owen Sound	Owen Sound	Fruits & Vegetables – Fresh	I deliver	30 1/2 peck bag	Weekly
Owen Sound	Owen Sound	Fruits & Vegetables – Fresh	I deliver		Weekly
Owen Sound	Owen Sound	Eggs	I deliver	15 Dozen	Weekly
Kincardine	Kincardine	Honey & Maple Syrup	I deliver	5 <u>Case</u> (12@1kg)	Bi-weekly
Kincardine	Kincardine	Fruits & Vegetables – Fresh	I deliver	N/a	Weekly
Chatsworth	Georgian Bluffs	Honey & Maple Syrup	I deliver	5 kg	Monthly
Brockton	#N/A	Eggs	Transport Company		Weekly
Meaford	#N/A	#N/A	I deliver	16 Bin (850 lb)	Weekly
South Bruce	GTA	Meat – fresh	I deliver	1.5	Other
Huron-Kinloss	Huron-Kinloss	Fruits & Vegetables – Fresh	I deliver	3 bushel	Weekly
Huron-Kinloss	Kincardine	Fruits & Vegetables – Fresh	Other	4 bushel	Weekly
Huron-Kinloss	Huron County	Fruits & Vegetables – Fresh	Other	20 bushel	Bi-weekly
Kincardine	Region of Waterloo	Fruits & Vegetables – Fresh	Transport Company	30 Bin (850 lb)	Bi-weekly
Kincardine	GTA	Fruits & Vegetables – Fresh	Transport Company	6 Bin (850 lb)	Monthly
Owen Sound	Meaford	Meat – fresh	I deliver	20 pheasant	Bi-weekly
Owen Sound	Owen Sound	Meat – frozen	I deliver	12	Semi-annually
Brockton	GTA	Meat – fresh	Transport Company	200 lbs	Weekly
Owen Sound	Owen Sound	Meat – frozen	I deliver	20 pheasant	Annually

Huron-Kinloss	Kincardine	Preserves & Condiments	I deliver	2 case	Other
Huron-Kinloss	Kincardine	Fruits & Vegetables – Fresh	I deliver	100 lbs	Other
Owen Sound	GTA	Meat – fresh	Other	20 pheasant	Bi-weekly
Huron-Kinloss	Kincardine	Preserves & Condiments	I deliver	2 case	Other
Owen Sound	Saugeen Shores	Meat – fresh	I deliver	20 pheasant	Semi-annually
Georgian Bluffs	South Bruce Peninsula	Honey & Maple Syrup	I deliver	small amounts 250 ml to 1 litre containers	Monthly
Hanover	Brockton	Fruits & Vegetables – Fresh	I deliver	1500 - 3000 lbs	Daily
Georgian Bluffs	Georgian Bluffs	Honey & Maple Syrup	I deliver	small amounts 100 ml to 1 litre containers	Monthly
Hanover	Grey Bruce	Fruits & Vegetables – Fresh	I deliver	100-500 lbs	Weekly
Hanover	Wellington County	Fruits & Vegetables – Fresh	Other	20-150 lbs	Weekly
Hanover	Region of Waterloo	Preserves & Condiments	I deliver	15 cases	Weekly
West Grey	GTA	Meat – fresh	#N/A		#N/A
Hanover	Arran-Elderslie	Honey & Maple Syrup	I deliver		Monthly
Arran-Elderslie	Guelph	Honey & Maple Syrup	I deliver	15 cases	Quarterly
Hanover	Hanover	Honey & Maple Syrup	I deliver		Monthly
Hanover	GTA	Fruits & Vegetables – Fresh	I deliver		#N/A
Arran-Elderslie	GTA	Honey & Maple Syrup	I deliver	15 12 bottle case	Monthly
Arran-Elderslie	Grey Bruce	Honey & Maple Syrup	I deliver	3 cases	Monthly
Hanover	West Grey	Honey & Maple Syrup	I deliver		Quarterly
Grey Highlands	n/a	Meat – frozen	n/a		n/a

---

Grey Highlands	n/a	Honey & Maple Syrup	I deliver	Other
Grey Highlands	n/a	Honey & Maple Syrup	Courier	Other

---

## Appendix D. Local Food Paths: Suppliers to Processors

Processor Location	Supplier Location	Item type	How does the product get there	Average volume per trip	Volume unit	Frequency
Arran-Elderslie	GTA	dried fruits nuts	Transport Company	200	kg	Quarterly
Arran-Elderslie	GTA	bread improvers	I deliver	100	kg	Quarterly
Arran-Elderslie	Hanover	flours	I deliver	100	kg	Bi-weekly
Arran-Elderslie	London	coffee beans	Transport Company	700	pounds	Quarterly
Arran-Elderslie	Owen Sound	yeast	I deliver	3	kg	Bi-weekly
Blue Mountains	Georgian Bluffs		I deliver		bushel	Weekly
Blue Mountains	Grey Highlands	apples	Transport Company	1	truck load	Daily
Brockton	West Grey	packaging, equipment	I deliver	3.5	boxes	Bi-weekly
Chatsworth	Chatsworth	Spelt Flour and misc. dry goods	I deliver	100	\$	Monthly
Chatsworth	Owen Sound	eggs	I deliver	5	dozen	Weekly
Chatsworth	Owen Sound	Spices, organic sugar, and some dry goods	I deliver	40	\$	Monthly
Chatsworth	Owen Sound	packaging	I deliver	35	\$	Quarterly
Chatsworth	Owen Sound	bacon	I deliver	9	lbs	Weekly
Chatsworth	Owen Sound	Groceries and Paper products	I deliver	130	\$	Weekly
Georgian Bluffs	Georgian Bluffs	maple sap	Other	450	gallons	Other
Grey Highlands	Brockton	Produce	Other			Other
Grey Highlands	Dufferin County	Produce	I deliver			Other
Grey Highlands	GTA		I deliver			Other
Grey Highlands	GTA	Corrugate	Transport Company			Daily
Grey	GTA	garlic	Transport Company			#N/A

Highlands					
Grey Highlands	GTA	spices	Transport Company		Monthly
Grey Highlands	GTA	Produce	I deliver		Bi-weekly
Grey Highlands	GTA	glass bottles	I deliver		Bi-weekly
Grey Highlands	Owen Sound	vinegar	I deliver		Bi-weekly
Grey Highlands	Owen Sound	labels	I deliver		Bi-weekly
Grey Highlands	#N/A	?	Other		#N/A
Huron-Kinloss	Region of Waterloo	containers	I deliver		Quarterly
Kincardine	Kincardine	beef	I deliver	2 cattle	Weekly
Kincardine	Kincardine	pig	Other	7 pigs	Weekly
Kincardine	Oxford County	cattle	Transport Company	200 lbs	Weekly
Northern Bruce Peninsula					
Northern Bruce Peninsula	Hanover	flour,sugar,etc	I deliver		Weekly
Northern Bruce Peninsula	Owen Sound	food	I deliver		Weekly
Northern Bruce Peninsula	Owen Sound	Baking supplies	I deliver	5 10 kg	Weekly
Northern Bruce Peninsula	Owen Sound	sugar	I deliver	5 2 kg	Bi-weekly
Saugeen Shores	GTA	Grains	I deliver	1000 kg	Monthly
Saugeen Shores	Hanover	Flour	I deliver	400 kg	Monthly
South Bruce Peninsula	GTA	Green Coffee Beans	I deliver	1000 lbs	Quarterly
South Bruce Peninsula	GTA	Kraft Bags	I deliver	2000 units/pieces	Semi-annually
South Bruce Peninsula	Owen Sound	Paper Cups - 12 oz & 8 oz	I deliver	2000 units/pieces	Semi-annually
South Bruce Peninsula	Owen Sound	Milk/Cream	I deliver	6 litres	Weekly
South Bruce Peninsula	#N/A	Labels	Courier	10 boxes	Quarterly

	Perth				
Southgate	County	cow	#N/A	2 cattle	Other
Southgate	Southgate	pig	#N/A	5 pigs	Weekly
	Arran-				
West Grey	Elderslie	Spring Water	I deliver	36 20l	Weekly
West Grey	GTA	Filter Cartridges	Courier	4 10 "	Quarterly
West Grey	GTA	Hops	Courier	2 5kg	Quarterly
West Grey	Guelph	Cleaning Chemicals	Other	4 20l	Quarterly
	Owen				
West Grey	Sound	O2 & CO2	Other	2 50kg	Monthly
	Wellington				
West Grey	County	Malted Barley	I deliver	4 25kg	Weekly
West Grey	West Grey	fresh vegetables	Other		Weekly

## Appendix E. Local Food Paths: Processors to Retail

Origin	Destination	What	How	Average volume per trip	Volume unit	Frequency	Seasonal Customer
Grey Highlands	Hanover	Dairy – refrigerated	I deliver	10	Case (6kg)	Weekly	No
Grey Highlands	West Grey	Dairy – refrigerated	I deliver	6	Case (6kg)	Weekly	No
Grey Highlands	Owen Sound	Dairy – refrigerated	Other	10	Case (6kg)	Bi-weekly	No
Grey Highlands	Grey Highlands	Dairy – refrigerated	I deliver	5	Case (6kg)	Weekly	No
Grey Highlands	Grey Highlands	Dairy – refrigerated	I deliver	8	Case (6kg)	Weekly	No
Hanover	Arran-Elderslie	Honey & Maple Syrup	I deliver			Monthly	
Hanover	West Grey	Honey & Maple Syrup	I deliver			Monthly	
South Bruce Peninsula	Meaford	Tea & Coffee & Herbs & Spices	I deliver	20	pounds	Monthly	No
South Bruce Peninsula	Owen Sound	Tea & Coffee & Herbs & Spices	I deliver	5	pounds	Bi-weekly	No
South Bruce Peninsula	Georgian Bluffs	Tea & Coffee & Herbs & Spices	I deliver	5	pounds	Weekly	Yes
South Bruce Peninsula	South Bruce Peninsula	Tea & Coffee & Herbs & Spices	I deliver	5	pounds	Weekly	Yes
South Bruce Peninsula	Owen Sound	Tea & Coffee & Herbs & Spices	I deliver	15	pounds	Bi-weekly	No
South Bruce Peninsula	Owen Sound	Tea & Coffee & Herbs & Spices	I deliver	30	pounds	Weekly	No
South Bruce Peninsula	Saugeen Shores	Tea & Coffee & Herbs & Spices	I deliver	30	pounds	Quarterly	No
South Bruce Peninsula	Owen Sound	Tea & Coffee & Herbs & Spices	I deliver	15	pounds	Weekly	No
South Bruce Peninsula	South Bruce Peninsula	Tea & Coffee & Herbs & Spices	Other	15	pounds	Monthly	Yes

Peninsula							
Blue Mountains	GTA	Fruits & Vegetables – Fresh	Transport Company		5 skids	Daily	No
Blue Mountains	Blue Mountains	Fruits & Vegetables – Fresh	I deliver		10 cases	Weekly	No
Blue Mountains	Meaford	Fruits & Vegetables – Fresh	I deliver		10 cases	Weekly	No
Kincardine	Kincardine	Honey & Maple Syrup	I deliver		Cases 5 (12@1kg)	Bi-weekly	No
Kincardine	Saugeen Shores	Meat – fresh	I deliver		300 lbs	Weekly	No
Kincardine	Arran-Elderslie	Meat – fresh	I deliver		75 lbs	Weekly	No
Kincardine	Saugeen Shores	Meat – fresh	I deliver		75 lbs	Weekly	No
Kincardine	Kincardine	Meat – fresh	I deliver		75 lbs	Weekly	No
Kincardine	Kincardine	Meat – fresh	I deliver		75 lbs	Weekly	No
Arran-Elderslie	Owen Sound	Tea & Coffee & Herbs & Spices	I deliver		10 pounds	Bi-weekly	No
Arran-Elderslie	Arran-Elderslie	Tea & Coffee & Herbs & Spices	#N/A			#N/A	
Arran-Elderslie	Hanover	Tea & Coffee & Herbs & Spices	I deliver		10 pounds	Monthly	Yes
Grey Highlands	Southwestern Ontario	Preserves & Condiments	I deliver			Other	No
Grey Highlands	Ontario	Preserves & Condiments	Courier			Other	No
Northern Bruce Peninsula	Northern Bruce Peninsula	Other	I deliver			Daily	No
Saugeen Shores	Southwestern Ontario	Grains & Pulses & Flour	I deliver		800 kg	Monthly	
West Grey	GTA	Juice & Wine & Beer	I deliver		1 40l	#N/A	Yes
West Grey	Grey Highlands	Juice & Wine & Beer	I deliver		1 50l	Bi-weekly	
West Grey	Arran-Elderslie	Juice & Wine & Beer	I deliver		1 50l	Bi-weekly	
Georgian Bluffs	Georgian Bluffs	Honey & Maple Syrup	I deliver	small amounts for tourist market	100 ml to litre	Other	Yes

West Grey	GTA	Juice & Wine & Beer	I deliver	1	40l	#N/A	Yes
Grey Highlands	GTA	Other	Transport Company	30	pallets	Daily	
Georgian Bluffs	South Bruce Peninsula	Honey & Maple Syrup	I deliver		small quantities of small sizes for tourist market 250 ml to 1 litre	Other	Yes
West Grey	Hanover	Juice & Wine & Beer	I deliver	1	50l	Bi-weekly	
West Grey	Owen Sound	Juice & Wine & Beer	I deliver	2	20l	Bi-weekly	
West Grey	GTA	Juice & Wine & Beer	I deliver	1	40l	#N/A	Yes
West Grey	Guelph	Juice & Wine & Beer	I deliver	1	40l	Bi-weekly	
Grey Highlands	Meaford	Preserves & Condiments	I deliver			Monthly	Yes
Grey Highlands	GTA	Preserves & Condiments	Courier			Weekly	No
Hanover	Grey Bruce	Fruits & Vegetables – Fresh	I deliver	100-500	lbs	Weekly	
Hanover	Wellington County	Fruits & Vegetables – Fresh	Other	20-150	lbs	Weekly	
Hanover	Region of Waterloo	Preserves & Condiments	I deliver	15	cases	Weekly	
Arran-Elderslie	Arran-Elderslie	Baking & Confectionary	I deliver			Monthly	No
Arran-Elderslie	Saugeen Shores	Baking & Confectionary	Other			Bi-weekly	No
Owen Sound	#N/A	Baking & Confectionary	I deliver			Weekly	No
Huron-Kinloss	#N/A	Honey & Maple Syrup	I deliver			Quarterly	Yes