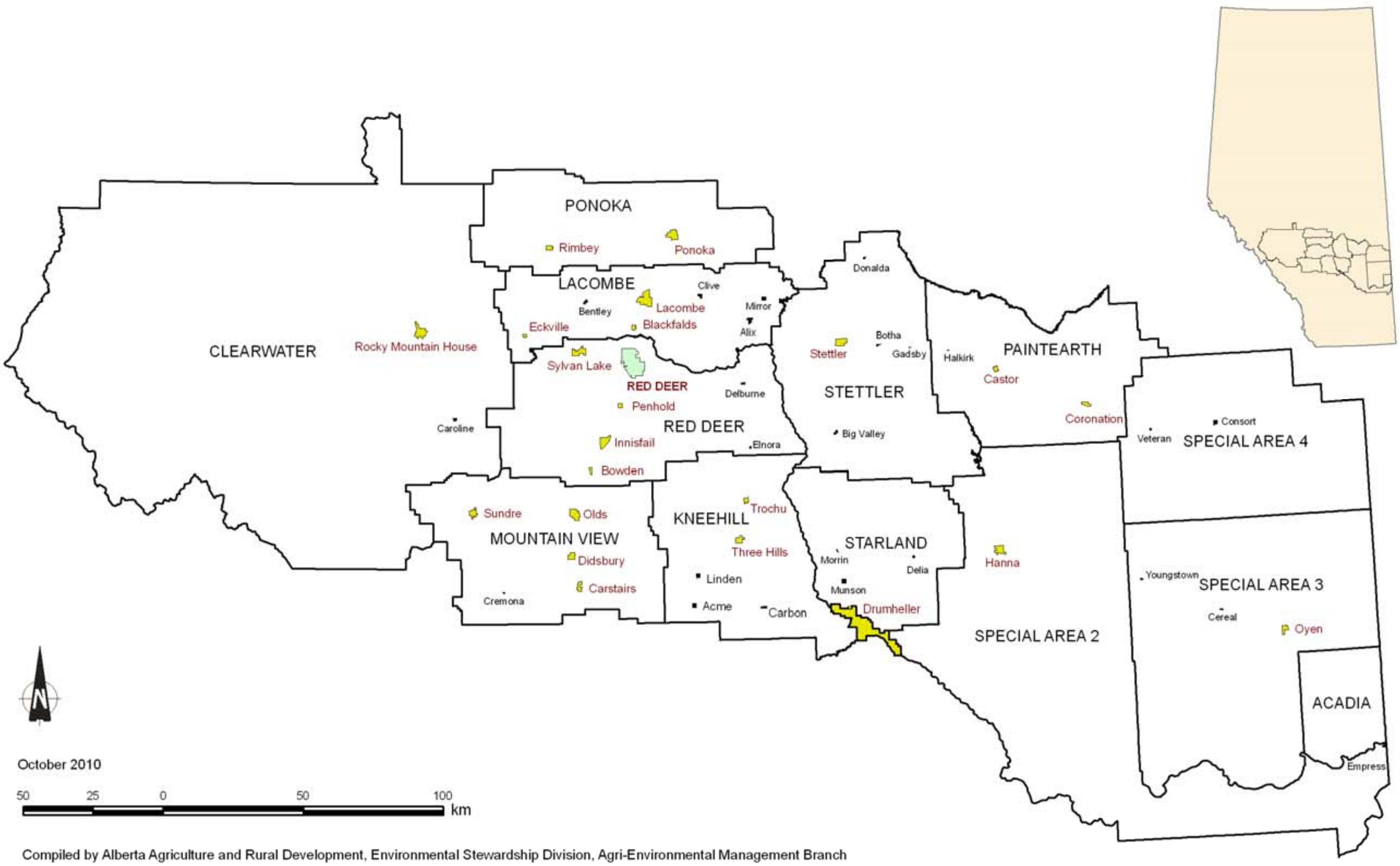
List of Appendices

Appendix A – Selected Municipalities from Agricultural Central Region of Alberta



Compiled by Alberta Agriculture and Rural Development, Environmental Stewardship Division, Agri-Environmental Management Branch

Appendix B – Reference Tables

Table 1 – Motivators in Support of Local Food

Used as a reference only.
Circle all letters which apply. Mark "i" for initial reasons and "s" for secondary reasons.
(Optional: May want to rank from 1 to 5, with 1 being the "most important" and 5 being the "least important".)

Quality	Environmental concerns	Economic/ Ethical benefits
a) __Fresher, tastier b) __Leaner, healthier c) __Possible allergic reactions, GMO, etc. d) __More diversity of products e) __Less processed, more whole food f) Other	a) __Less food miles b) __CO2 emissions c) __Sustainability d) __Biodiversity vs Monoculture e) __Less fossil fuel dependent f) __Organic g) __Reduced pollution problems from runoff into water h) __Less pesticides/herbicides i) __Antibiotic resistant bacteria – susceptibility increases in human j) Other	a) __Keeps money in local economy, economic spinoffs b) __Support covering cost of production vs buying cheaper food c) __Closer to home d) __Supports smaller family farms (in general) e) __Want to support local farmers (closer to region) f) Other
Food Safety	**Consumers' Values**	**Other**
a) __Awareness of how food is raised, grown b) __Less us of antibiotics, irradiation in smaller animal operations c) __Reduced risk of fecal organisms d) __Antibiotic resistant bacteria concern e) Other	a) __Asking for local product (various reasons) b) __Want to support local farmers c) __Taste, freshness, quality d) __Enjoy uniqueness of local flavour or seasonally unique products e) __Food experience and food value f) __Indulgent, artisan, handcrafted g) __Slow food h) __Real food i) Other	a) __ b) __ c) __ d) __ e)
Other	**Other**	**Other**

Table 2 – Alberta Produced Food Categories

Used as a reference only.

Meat:	**Veggies** (fresh):	
▪ Beef ▪ Hamburger ▪ Pork ▪ Ham ▪ Bacon ▪ Chicken ▪ turkey ▪ lamb ▪ Bison, Elk…	▪ Asparagus ▪ Beans ▪ Beets ▪ Broccoli ▪ Brussel sprouts ▪ Cabbage ▪ Carrots ▪ Cauliflower ▪ Celery ▪ Corn ▪ Cucumbers ▪ Lettuce	▪ Onions (green) ▪ Onions (cooking) ▪ Peas ▪ Peppers ▪ Pumpkin ▪ Radishes ▪ Rutabagas ▪ Squash ▪ Tomatoes ▪ Zucchini
Dairy & Eggs:	**Fruit:**	**Processed or Frozen:**
▪ Fluid milk ▪ Yogurt ▪ Cheese(types) ▪ Butter ▪ Ice cream ▪ Cottage cheese ▪ Eggs	▪ Strawberries ▪ Raspberries ▪ Saskatoons ▪ Apples ▪ Black Currents ▪ Sour cherries	▪ Perogies ▪ Corn ▪ Carrots ▪ Peas
Bakery:	**Legumes:**	**Grain & Oilseed Products:**
▪ Bread ▪ Buns ▪ Cookies	▪ Lentils ▪ Peas ▪ Beans ▪ Chickpeas	▪ Wheat & other cereals ▪ Flax
Sundries:		
▪ Honey ▪ Canola Oil		

Appendix C – Summary of Buyer Issues – ARD Focus Group Meeting

On September 29, 2010, a focus group meeting was held with ARD staff to explore the various markets from a buyer's perspective, representing the foodservice industry, retail, restaurant chefs, and convenience stores. The discussion focused on issues and barriers that often hinder the expansion of local food in Alberta, as well as potential solutions, and current activities that can help address these barriers. This information was used to better understand a buyers' perspective, and in preparation for the buyer interviews.

The information below is a summary only, rather than a comprehensive list of: buyer groups, issues, barriers, and solutions to local food expansion. It does not reflect issues of all buyer groups, nor is it representative of the entire province of Alberta.

Categories of Buyers

The main groups of buyers are:

i. Food Service
ii. Retail
iii. Convenience Stores
iv. Other

Categories and examples within each of the Main Groups:

i. Food Service - "Food Service is any food served away from home."
(Note: categorization of food service depends on volume)
- Independent restaurants
- Locally owned chain restaurants (not large chains)
  - Sorrentinos
- Independent coffee shops
- Institutions
  - Colleges
  - Health care facilities
  - Cafeterias
- Correctional facilities
- Truck stops and delis
- Catering
- Bed and breakfast
- Other - arenas, fairs, community functions

ii. Retail
- Specialty retail
  - H&W
  - Drug stores: London Drugs, Shoppers Drug Store
  - Italian Centre
  - Community Natural Foods
  - Planet Organic
  - Sunterra

- Local retail
  - Co-op stores
- National chains
  - Safeway
  - Sobeys
  - Save-On Foods
  - Superstore, Extra Foods, No Frills (Loblaws Group)

- Membership & big box stores
  - Costco
  - Wal-Mart
  - Zellers

iii. Convenience Stores

- 7-11
- Mac's
- Husky / Mohawk
- Truck stops

iv. Other….

- Fundraising
- Farmers' Market
- Ingredients - supplied to processors

Barriers or Issues to Purchasing Local Food: (as expressed by buyers, others...)

Issues are grouped under the Categories: Finding, Ordering, Delivery and Education

F= Finding, O= Ordering, D= delivery, E= Education

Category	Issue	Who
(F)	Promoting new and different products – Scanning for early signals for new and changing consumer tastes *(i.e., open-house to display and promote product; research product demand)*.	(Producers, Buyers – chefs)
(F/O/D)	Supply – both volume availability and consistency. *(Note: consistency includes quality, quantity of delivery, reliable delivery times, etc.).* Need a back-up plan when product can't be delivered; when things don't go according to plan *(i.e., consistent supply)*.	(Producers, Buyers – chefs, retail …)
(F)	Time it takes to find producers and right products.	(Buyers – chef, food service)
(O)	Time it takes to buy local products; to deal with various producers.	(Buyers – chef, food service)
(O)	Authenticity and traceability of locally grown foods. Price may also be an issue.	(Producers, Buyers - retail)
(O/E)	Others are not marketing the local food of producers – no package logo of where the local food is from.	(Distributors, Buyers – chef, food service)

(D)	Consistency - in delivery of product quality.	(Producers, Buyers)
(D)	Shipping - smaller companies need to be able to ship or package their products adequately to ensure quality and adequate shelf life.	(Producers/Processors)
(D)	Bad experiences: producers not having product or stock available, or not delivered on time.	(Producers, Buyers – retail, food service)
(D)	Costly to move local food through traditional channels.	(Producers)
(D)	Time that is needed to deliver products – personal delivery.	(Producers)
(E)	Valuing the cost of time to produce products.	(Producers)
(E)	Must be business oriented (vs a hobby).	(Producers)
(E)	Need to better understand the system; how to enter these markets *(i.e., how to approach retailers, food service buyers…).*	(Producers, Buyers – retail, food service)
(E)	Need to match technologies – Producers rely on fax or phone; larger companies (buyers) rely on online purchasing.	(Producers, Buyers)

Solutions to Barriers: Potential actions or those currently being implemented

SOLUTIONS- **Finding**
Current/ Additional: o Hosting open houses to display local products. o Getting the right people to the right tables – building relationships, connections, awareness, and associations. o Establish a list of what buyers need; find and encourage promotion of new products – need a 'forager' *(i.e., a person, agency or information distribution centre that matches producers and buyers).* o Ask the food service industry what they are looking for; tell them what the producers have to offer; make those connections. o Have a standardized process or graduation program • *E.g., "Ten steps to Retail" program. As producers deal with different foodservice or retail markets, there is a progression of volume requirements (and size of farm) that is required to meet that market. Government could play a role in this. A set of criteria (for the producer) could help to better identify the scale/size needed for a particular market, along with information to create an awareness of the steps involved. The general progression to entering markets (related to volume) is as follows: Smaller restaurants→ Larger chain restaurants→ Specialty Retail→ National Retail.*

SOLUTIONS- **Ordering**
Current/ Additional: o Dine Alberta list. o Facilitate ordering systems. o Need to make ordering local foods simple and convenient. o Understanding of technology, on how ordering is done *(e.g., online ordering versus telephone/fax).* o Regulatory body and investigation for authenticity of local products.

- Alberta branding system.
- Traceability system.

SOLUTIONS- **Delivery**
Current: - ~~o~~ Co-operative distribution systems or larger companies that can act as a marketing-arm; provide education to those who want to know more about co-operatives.

SOLUTIONS- **Education & Awareness**
Current: - Alberta Agriculture and Rural Development (ARD) hosted chef tours in the past. - Roundtable with chefs and producers- create relationships. - Five-step marketing guide. - Fact sheets for producers - on how to get into the food service industry. - Mentorship programs in food service. - Product pricing workshops. Additional: - Graduation type of program for companies, as they progress from one market to the next. - Assist producers with transitioning from a traditional farming paradigm; approach marketing differently. - Research is needed to find out what products are in demand - what is new and upcoming *(e.g., striped beets… something to feature that is unique).* - Assist companies to be "market-ready" *(e.g., companies planning to expand beyond their existing operation).* - Share information with producers, on the types of products that chefs, food service, and retail are wanting. - Highlight local producers' success stories; recognize groups of growers and their products.

Appendix D – Questionnaire for Buyers

Background & Overview of Purchasing Local

Purpose: to identify buyer motivators, champions, issues, and logistics, around the purchase of Alberta's local foods, and identify those companies that may want to participate in a forum session in the future.

Potential Participants: buyers within the industry sectors of food service, retail, or with restaurant chefs.

Introduction

This project is about the Distribution and Best Practices of Local Food. The intent of this study is to understand the challenges in the distribution of Alberta's local foods, and in particular within the Central Region (Red Deer area). *(Explain parameters of this region; the town/cities it includes.)* This can be achieved either through:

- Increased purchases from the Central Region and marketed within the same region, or…
- Increased purchasing from the Central Region and marketed to other parts of the province.

We are looking at smaller producer or processor operations within the Central Region, who have smaller quantities to ship or store, and transportation or storage companies that potentially could work with them.

Survey Questions

1. According to your business, how would you define Local Food?

(Compare answers with some of the categories below)

a) *Within 100 miles*
b) *Within the city or region*
c) *Within Alberta*
d) *Within Western Canada*
e) *Canada*
f) *Within North America*
g) *Other: ______________*

2. Focus of the Study

For the sake of this study we are defining Local as:
"Food that is produced or processed in Alberta".

Are you currently purchasing any of Alberta's local products? (Y/N)

(If "Yes" – skip to Q4);
(If "No, but Planning to Start" – go to Q3a)…or…

OPTIONAL: (If No, and Not wanting to Start" – go to Q3d)

If in Q2, said, "Not purchasing local, but Planning to Start"

3. ***a) Initially, whose idea was it to start buying local product from Alberta? What was their role or position (e.g., a chef, customer, staff…)?***

b) What were the main reasons (or motivation) for wanting to start the purchase of Alberta products? *(See categories below. Details of Categories found in Table 1.)*

(Please mark all that apply with "i" for initial motivation, "s" for secondary)

__Quality
__Environmental Concerns
__Economic/ Ethical benefits
__Food Safety
__Consumers' Values
__Other

c) Does your company have specific plans laid out for getting started? (For example: How soon do you plan to start? Where do you hope to source from (i.e., location))?

[For Retail, or larger businesses, skip to Question #6, and then Question #9]
[For Chefs, or smaller operations, skip to Question #9]

OPTIONAL: If in Q2, said "NOT Currently Purchasing Local, and NOT Wanting to Start"

d) If you are currently NOT buying local from AB, can you explain your reasons?

__Too expensive
__Not enough supply
__Difficult to coordinate with (producers, trucking……)
__Other

[Since "Not wanting to buying local", interview stops here.]

If Currently Purchasing Local (Alberta):

4. ***Can you provide us with more details around purchasing Alberta product, such as…***

a) How long have you been purchasing?

__ Months
__ Years
__Seasonally for _____ (months) over ____years

b) What locations in Alberta are you sourcing product from?

__Within Central Region (Red Deer area) ____
__Outside the region ____

Reasons for Buying Local *(i.e., specific motivators):*

5. ***a) Initially, whose idea was it to start buying local product from Alberta?***
What was their role or position (e.g., a chef, customer, staff…)?

b) What was their (your) initial motivation for buying local from Alberta (initial reasons), and did those reasons change over time (secondary reasons)?

(See categories below. Details of Categories found in Table 1.)
(Please mark all that apply with "i" for initial motivation, "s" for secondary)

__Quality
__Environmental Concerns
__Economic/ Ethical benefits
__Food Safety
__Consumers' Values
__Other

c) *[OPTIONAL]:* ***From the reasons that you gave me (restating reasons from b), how would currently rank these, from being the most important, to the least important reasons for buying local, with 1 being the most important, 2 being of next importance) (Refer to Table 1 list)***

[Continue with Q#6 - For Retail buyers, or other large companies]
[Omit Q#6, and skip to Q#7 - For Chefs, or smaller companies.]

Goals/Values:

6. ***a) Is your company developing (or has it already developed) overall goals, which it hopes to achieve in regards to buying local? (E.g., "plan to buy more, broaden our purchases.")***
(Or see list b) below for a company that has a stronger commitment/ target for Local)

[ALTERNATE Q: for larger businesses, or those with a formal program/policy in place for local purchasing.]

b) Does your business (or company) have a formal local food promotional program or a local food policy that they are trying to implement? (Y/N)

Some possible goals listed below:

__To reach a certain % local of the total food products purchased

__Set aside $____ from our budge for local food purchases, per month, or year, etc

__Support local farmers seasonally, ____ months of the year

__Other reasons____

[If "Currently Buying Local", continue with Q7.]
[Otherwise, if "Planning to start buying Local", Skip to Q9, Q10, then Q13]

Logistics:
(See Table below for Questions 7a, b, & c)

7. a) What different types of local products from Alberta do you currently buy in the course of the year (i.e., a general listing, such as meat products, fruit and vegetables, herbs, condiments)?
(Refer to Table 2, for specific types of products within each category).
b) Over what time frame were you able to purchase each of these types of products?
c) How often do you make purchases of these products (i.e., frequency)?

8. a) Who do you buy products from (e.g., from individual farms, or organizations/coops, etc)? (Please provide details.)
b) How do you receive these products? Are they delivered or do you pick them up? Any other arrangements?

7a) *7b)*	Which pdts	All Year	Seasonal	Special occasion	Frequency	Indiv farm / Group of farms	Delivered / Picked up
	Check (x)…or List	*Check (x)*	*Indicate months*	*Explain*	*___ /wk, ___ / mo, etc*	*Please list*	*D / PU …or Explain further*
Meat (frozen)							
Meat (chilled)							
Veggies (frozen)							
Veggies (fresh - greenhouse)							
Veggies (fresh-field)							
Veggies (root crops)							
Veggies (potatoes)							
Fruit (frozen)							
Fruit (fresh)							
Dry beans, peas, lentils, or chickpeas							
Dairy							
Eggs							
Bakery							
Grain & oilseed products							
Honey							
Oil							
Other							

Potential & Issues:

9. ***a) What do you see as the biggest challenges to purchasing Alberta's local products? (in general) (See table below). For which products in particular? (Indicate in the table and explain below)***

b) [Note to Interviewer: Please place a check mark whether the issue relates more to the "buying process" from producers or to "distribution & storage companies". (See table below)]

c) [Note to Interviewer: Are these anticipated challenges (not yet experienced, but expected)? Or are these challenges you have already encountered? (Please mark in table "A" for anticipated and "E" for encountered. Please explain further as needed).]

d)** [OPTIONAL]* ***You mentioned the following barriers (list is repeated). How would you rate these, as the most important barrier, to the least important (1 = most important, 2 = next in importance…etc.) (See table below)

9d	9c	9a		9b (please check)	
Rank 1-5	A or E?	Challenges to Purchasing / Gaps	Products	Re: Buying process	Re: Transp. / Storage
		i.			
		II.			

10. ***What would it take to overcome these gaps or barriers? (List repeated, one at a time)***

Possible Solutions to Challenges
i.
II.

[If "Planning to start buying Local", Skip to Q13]

Q#11 – Ask only, if internal challenges were not mentioned in Q#9

11. ***a) Has the purchase of local food (from AB) impacted the internal operations of your business, where adjustments were required within the business operations? (Y/ N)***
If yes, please explain and list a few. (e.g., top 3-5 impacts) (See table below)

b) If you could rank them, which would you say has impacted your operation the most? (mark as #1). Which impact would be the next in line? (mark as #2.. etc.) (See table below)

(Scale: 1 = impacted business the most, 2 = next greatest impact, etc.)

11a) Describe Impacts	b) Ranking of Impact
-	-
-	-

12. a) As a whole, how satisfied are you with your purchases of AB local food? (Please explain).
If you could rank this success on a scale of 1 to 5, how would you rank your overall success, with 1 being Very Satisfied; 3 as Moderately Satisfied; and 5 as Not Satisfied,?

Success of: *Rank success rate (1-5):*
a) Overall AB purchases *#_____*

b) Are there certain products that tend to be easier, when purchasing local foods? (Y/N)
If "yes", please explain.
[Optional: How would you rank them overall on a scale of 1 to 5… with 1 being Very Easy; 3 as Moderately Easy; and 5 as Difficult,?]

b) Which products? ____

Other Comments or Ranking: ____

Appendix E – Challenges in Purchasing Alberta's Local Food

Ranking and Weighting of Buyers' Responses

Buyers' Responses	**Ranking & Number of times mentioned**			**Calculation**	**Total**
	First (3 points)	Second (2 points)	Third, or not ranked (1 point)		
Quality	1x	2x		(1x3)+(2x2)	= 7
Price	2x			(2x3)	= 6
Quantity	1x	1x		(1x3)+(1x2)	= 5
Lack of Awareness			4x	(4x1)	= 4
Delivery-when-required	1x			(1x3)	= 3
Small-delivery- coordination		1x		(1x2)	= 2
Delivery			2x	(2x1)	= 2
Product-uniqueness		1x		(1x2)	= 2
Buying process is difficult			1x	(1x1)	= 1
Business-like approach needed			1x	(1x1)	= 1

The **Participant Responses,** along with the **Totals**, were entered into Wordle™ to create the diagram below, which weights the responses according to ranking and number of times mentioned.

Feinberg, J. (2009) *Wordle™* Retrieved March 31, 2011 from http://www.wordle.net/advanced

Appendix F – Questionnaire for Logistics Companies

Background & Overview: Transportation Companies

Purpose of the Project: to identify regular transportation routes and practices, interest in local food distribution, motivators, champions, and identify those companies that may want to participate in a forum in the future.

Participants: transportation companies within the Central Region (Red Deer area), or those that regularly travel through it (i.e., Calgary-Edmonton Corridor).

Introduction

This project is about the Distribution and Best Practices of Local Food. The intent of this study is to understand the challenges in the distribution of Alberta's local foods, and in particular within the Central Region. *(Explain parameters of this region; the town/cities it includes.)* This can be achieved either through:

- Increased purchases from the Central Region and marketed within the same region, or…
- Increased purchasing from the Central Region and marketed to other parts of the province.

We are looking at smaller producer or processor operations within the Central Region, who have smaller quantities to ship or store, and transportation or storage companies that potentially could work with them.

Survey Questions

[Note that Questions 1 & 2 are general questions; the Local Food Section starts with Question 3]

Background/ Capacity:

1. ***a) What are the main food and beverage products currently being carried? (i.e., a general listing vs specifics (Refer to Table 2, for a detailed listing of each category)***
   b) Can you indicate whether they are Frozen, Fresh/chilled, or Dry goods?
   c) Can you estimate the percentage of total goods carried by Dry, Fresh/chilled or Frozen?
   d) If you are not carrying refrigerated or frozen goods, do you have the capacity for this? (Y/N)
   If "Yes", would you estimate the potential capacity, as _____sq feet, or as a ___% of your total?

1a) Food/products	1b) Frozen	1b) Fresh /or Chilled	1b) Dry, ambient or (room) temp	
E.g., Vegetables				
Meat				
Veggies- field, leafy or greenhouse				
Veggies – root crops				
Potatoes				
Fruit				
Dry beans, peas, lentils or chickpeas				
Dairy				
Eggs				
Bakery				
Grain, Oilseed products				
Sundries (honey, oil)				
Other				
1c) Can you estimate the percentage of total goods carried, by Dry, Fresh/chilled or Frozen?	%	%	%	=100%

Geography:

2. ***Can you describe your business in general, such as your usual runs (i.e., whether it involves local food or not)? For example:***
   a) Names of towns to where you deliver?
   b) How often do you travel these routes in a given week?
   c) Does what you haul determine the number of runs (i.e., Dry goods; Fresh or Chilled; Frozen goods)? Please explain

2a) Route (towns)	b) Frequency	c) Dry/Amb = D Chilled/Fresh = C Frozen = Fz

Local Foods Section:

For the sake of this study we are defining Local as:
"Food that is produced or processed in Alberta".

3. ***a) Do you transport any Alberta local foods? (Yes/ No/ or Don't Know).***
   Can you indicate which food types? (Check all that apply in table below)

   [If "No" or "Don't know", skip to Question #6]

---

b) If Yes, could you estimate the percentage of AB local foods carried within each category,
c) Or… could you estimate the percentage of AB products of the Total Products carried?
d) What months are you typically dealing with local food? (Seasonal? Year round?)

3a) Alberta Food Products *(Check all those that apply)*	3b) AB as % of Category	3d) Period of Handling? (Months,,seasonally, all year?)
Meat		
Veggies – field, leafy or greenhouse		
Veggies – root crops		
Potatoes		
Fruit		
Dry beans, peas, lentils or chickpeas		
Dairy, Eggs		
Bakery		
Grain & oilseed products		
Sundries (honey, oil)		
Other		
3c) AB products as % of Total Products?	%	

Motivation:

4. ***Initially, what were the reasons (or motivation) for getting into the transport of Alberta's (local) food products? (i.e., primary reasons that drew them)***
   (Check below all that applies and provide details) (See Table 1 for details within each category)
   - __*Quality*
   - __*Environmental Concerns*
   - __*Economic/ Ethical benefits*
   - __*Food Safety*
   - __*Consumers' Value*
   - __*Other*

5. ***a) Is your company developing (or have they already developed) overall goals that it hopes to achieve in regards to buying local?*** *(Or see list b) below)*

   [ALTERNATE Q: for large businesses, or ones with a formal program/policy in place for local purchasing.]

   b) Does your business (or company) have a formal local food promotional program or a local food policy that they are trying to implement? (Y/N)

   Some possible goals listed below:

   __To reach a certain % local of the total food products purchased

   __Set aside $_____ from our budge for local food purchases, per month, or year, etc

   __Support local farmers seasonally, _____ months of the year

   __Other reasons____

Potential & Issues:

6. ***a) Do you see a greater potential for the distribution/storage of Alberta's food products, which is currently not being met? (Y/N) (If yes, see table below)***

   b) If yes, please list the challenges that are getting in the way. To which market channels do these apply (i.e., to retail, restaurants, other…)

   c) [Note to Interviewer: Please place a check mark, whether the issue relates more to the "buying process" from producers or to "transportation/storage to the market".]

   d) [Note to Interviewer: Are these anticipated challenges (not yet experienced, but expected)? Or are these challenges you have already encountered? (Please mark in table "A" for anticipated and "E" for encountered. Please explain further as needed).]

   e) *[OPTIONAL]* ***You mentioned the following barriers (list is repeated). How would you rate these, as the most important barrier, to the least important (1 = most important, 2 = next in importance…etc.) (See table below)***

6e Rank 1-5	***6d*** A or E?	***6b*** Challenges	Which Market channel	***6c*** *(please check)* Re: Buying process	Re: Transp. / Storage
		i.			
		ii.			

7. ***If yes, what would it take to overcome these gaps or challenges?***

Possible Solutions to Challenges
i.
ii.

Background and Overview: Storage/Warehouse Companies

Purpose of the Project: to identify storage companies and their practices, their interest in local food distribution, motivators, and identify those companies that may want to participate in a forum session in the future.

Participants: storage companies, within the Central Region (Red Deer area), or those that deal with this region.

Introduction

This project is about the Distribution and Best Practices of Local Food. The intent of this study is to understand the challenges in the distribution of Alberta's local foods, and in particular within the Central Region. *(Explain parameters of this region; the town/cities it includes.)* This can be achieved either through:

- Increased purchases from the Central Region and marketed within the same region, or…
- Increased purchasing from Central Region, and marketed to other parts of the province.

We are looking at smaller producer or processor operations within the Central Region, who have smaller quantities to ship or store, and transportation or storage companies that potentially could work with them.

Survey Questions

[Note that Questions 1 & 2 are general questions; the Local Food Section starts with Question 3]

Background/ Capacity:

1. ***a) What are the main food products currently handled through your business operation (i.e., a general listing, vs specifics)? (See Table 2, for a detailed listing of each category)***
   - *Meat, Vegetables…*

   b) Can you indicate whether they are Dry goods, Fresh/chilled, or Frozen?

   c) Are you able to estimate the percentage of goods handled by category (i.e., Dry, Fresh/chilled, or Frozen)?

1a) Food/products	1b) Frozen	1b) Fresh /or Chilled	1b) Dry goods or Ambient room) temp	
E.g., Vegetables	x			
Meat				
Veggies – field, leafy or greenhouse				
Veggies – root crops				
Potatoes				
Fruit				
Dry beans, peas, lentils or chickpeas				
Dairy, Eggs				
Bakery				
Grain, Oilseed products				
Sundries (honey, oil)				
Other				
1c) Can you estimate the percentage of total goods handled by Dry, Fresh/chilled or Frozen?	%	%	%	=100%

2. ***Can you describe your business logistics in general, in regards to handling food (whether it is local or not)? For example:***

   a) What are some of the main transport companies you deal with?

   b) How often do these companies deliver in a typical week?

   c) How does that relate to the food type they bring?

2a) Main transport companies	2b) Frequency	2c) Dry/Amb = D Chilled/Fresh = C Frozen = Fz

Local Foods Section:

For the sake of this study we are defining Local as:
"Food that is produced or processed in Alberta".

3. ***a) Are you handling Alberta's local food? (Yes/ No/ Don't Know)***
Can you indication what food types? *Check all that apply in table below)*

[If "No" or "Don't know", skip to Question #6]

---

b) If yes, could you estimate the percentage of Alberta foods that are handled, by category?
c) Or… could you estimate the percentage AB products of the Total Products carried?
d) What months are you typically dealing with Alberta's local food? (Seasonal? Year-round?)

3a) Alberta Food Products *(Check all those that apply)*	3b) AB as % of Category	3d) Period of Handling? (Months,,seasonally, all year?)
Meat		
Veggies – field, leafy, or greenhouse		
Veggies – root crops		
Potatoes		
Fruit		
Dry beans, peas, lentils or chickpeas		
Dairy, Eggs		
Bakery		
Grain & oilseed products		
Sundries (honey, oil)		
Other		
3c) AB products as % of Total Products?	%	

Motivation:

4. ***Initially, what were the main reasons (or motivation) for getting into the handling of Alberta's (local) food products?***
(Check below all that apply and provide details) (See Table 1 for details within each category)
__*Quality*
__*Environmental Concerns*
__*Economic/ Ethical benefits*
__*Food Safety*
__*Consumers' Values*
__*Other*

5. ***Is your company developing (or have they already developed) overall goals that it hopes to achieve in regards to buying local? Please Explain.***

Potential & Issues:

6. ***a) Do you see a greater potential for the storage/distribution of Alberta's food products, which is currently not being met? (Y/N) (If yes, see table below)***

b) If yes, please list the challenges that are getting in the way. To which markets do these apply?

c) Note to Interviewer: Please place a check mark, whether the issue relates more to the "buying process" from producers or to "transportation/storage to the market".

d) Note to Interviewer: Are these anticipated challenges (not yet experienced, but expected)? (Please Mark as "A" in table. Please explain further as needed)

e) [OPTIONAL] You mentioned the following barriers (list is repeated). How would you rate these, as the most important barrier, to the least important (1 = most important, 2 = next in importance…etc.)? (See table below)

6e	***6d***	***6b***		***6c** (please check)*	
Rank 1-5	A or E?	Challenges	Which Market type	Re: Buying process	Re: Transp. / Storage
		i.			
		ii.			
		iii.			

7. ***If yes, what would it take to overcome these gaps or challenges?***

Possible Solutions to Challenges
i.
ii.
iii.

Appendix G – Questionnaire for Producers' Focus Groups

Introductions

Please describe your business and the types of products you produce.

Questions

1. ***Please describe the types of markets you are in. At which locations are these markets? Currently, how are you getting your product to market?***

2. ***Are you considering either expanding your business or entering a new market, where you know there is an assured demand for your product?***

3. ***a) What are some of the biggest challenges or barriers you face getting into these markets (i.e., challenges with expansion, in general)?***

   b) What are some of the biggest challenges or barriers you face in the area of logistics (i.e., transportation /or storage)?

4. ***a) What solutions are needed to overcome these challenges or barriers to expansion (in general)?***

   b) What solutions are needed to overcome logistical challenges or barriers (i.e., transportation &/or storage)?

5. ***a) As part of the solution, are there industry networks, or organizational structures currently in place, which can further advance the local food market (i.e., what are the strengths of the industry)?***

   b) Is there infrastructure already in place that could play a greater role in achieving this goal, such as shared equipment (trucks, processing facilities…) or other physical types of assets?

Appendix H – Local Food Distribution Forum

Local Food Distribution Forum Agenda

January 24, 2011, Red Deer Lodge, Red Deer AB

9:30 a.m. Arrive, Coffee and Network

10:00 a.m. Welcome by Kathy Bosse, ARD

10:15 a.m. Keynote by Paul Knechtel, 100 Mile Market

11:15 a.m. Alberta Panel – Local Distribution Solutions

- Rudy Knitel, Galimax Trading Inc.
- Ivan Smith, Big Bend Bison Market
- Wade Sirois, Infuse Catering

12:30 p.m. Local Lunch – Served by Red Deer Lodge

1:00 p.m. Transport & Logistics - Working with providers

- Ross Sten, H& R Transport

1:30 p.m. Exploring Solutions facilitated by Margurite Thiessen, ARD

- Participants will interact to start to identify solutions that work for them.

3:30 p.m. Wrap –Up and Adjourn
Safe Travels

Local Food Distribution Forum

Exploring Solutions Session

Combined Table Discussion Notes *January 24, 2011*

What type of delivery or distribution system are you currently using? Or
What type of systems do you see happening in your area?

- New group formed under the Capital Region Local Food Initiative is working on something for meat distribution.
- Part of the Pilot Project with Good Earth Food Box for 6 weeks, which was just in time delivery for local produce pick-up. Now looking at warehouse pick-up scenarios.
- Direct Marketing – varies between 2-3 producers in the group that have pasture meats. The mature business owner deliveries to the store outlets themselves, then the second attends weekly farmers markets and the third direct markets on demand. The group has noticed that the term "finished" becomes one of those issues for definitions.
- Competition does not always comply (imports coming from India for example, make some buyers focus on price based decisions only). Logistics works well for the food service end, but retail is the challenge.
- Quality wise, what doors do you open that provides the best position for my business. Currently distribute through farmers market, but want to grow and will need to figure out how distribution will work at the next level. The criteria for interprovincial distribution will also need to be determined in the decisions.
- Several methods used. Owns fleet for the 100 mile radius, uses short-line companies with cold storage like Versa Cold and then works with both small and large distributors to move product.
- Buyer picks up products.
- Farmers markets.
- E-Local First. Purchase on-line and delivers to home.
- Good Food Box (organic).
- U-Pick.
- Distributors.
- Local Food websites in Edmonton area. For example, Good Food Box (home delivery of produce & warehouse pickup and Eat Local First).
- Independent.
- CSAs. Consignment.

What did you learn today that could enhance or make a difference to your business?

- Regional marketing, success in the larger markets. How can we adapt to Alberta?
- People with talent and resources can make distribution work.
- About how the 100 Mile Market concept, is taking on steam and producers get to specialize and move product that they are making a living.
- Networking opportunity.
- Sharing contact information. Focus on what we do well and help to partner to establish a system that works.
- Promotion of local food.
- Vehicles for sharing network, a source of being listed.
- Coordination of suppliers. Maybe a warehouse depot in different locations, where you distribute from these points. Consolidate fees, etc between smaller producers/processors.
- Liked the distribution staff as becoming part of the sale team of the company. Coordinate by producers to make it happen.
- Government support local sourcing for events or assistance in coordination points. Sort of a percentage of local must be used in public cafeterias, similar to the percent Canadian content idea.
- Possible program to help start-up business for local distribution system similar to how government started out with liquor commission and now privatized. Once system working has to become profitable and responsibility of private sector.
- Create or do something to form a regional diversity brand, what is it and how to market.
- Work with Good Food Box to develop a model like the 100 Mile Market and make sure it is a for-profit-business model and structure.
- Still needs to be competitive, discussion of local and organics.
- Need integrity to maintain growth and local initiative.
- How to get consumer trust.
- Trust the distributor
- Relationships.
- Tour.
- Pulling producers together for distribution, rather than individual versus working together.
- Education of producers.
- Regulations impact business.
- Local food nationalized. May be more effective.
- Producer Consolidation could save dollars. Need steady and consistent volume and one coordinator working out the price and schedule.
- Value chain and recognition of the roles of all players.
- Government needs to support the associations that will help consolidate for efficient transport and value chain. (e.g., FPLRC – Food Processors Logistics Research Council).
- Safety of local food.
- Education.
- Share the same problems.

- Didn't realize that we have no local distribution system in Central Alberta.
- Need to create a local brand.
- Chain restaurants won't or can't buy local.
- Must keep the public aware constantly.
- Communication is a huge challenge.
- Great need for education and promotion of existing resources. (i.e., Dine Alberta)
- Use technology like social media.
- Local, affordable and accessible.
- Bridging the gap between farmers markets and retail.
- What can we learn from the ON model.
- What is government's role?
- Financing is a consideration.
- Better awareness of what is available.
- Producer/chef kitchen.
- Paul's presentation
- Meeting everyone
- Why we buy products from India etc.
- Another model is the CEO club. Owned by members, administration fee, consolidation models on time consistency, annual member fee.
- System for profit is the model. Someone steps up and starts what we can do.
- Utilize empty trucking. (i.e., trucks going home empty).
- Many thoughts on government role.
- Encourage stores/retail to buy local.
- Backstop finance so a '100 mile model' can get going.
- Carcass utilization.

What are some of the unanswered questions you have regarding distribution?

- How to get small company product out?
- How to share what works? (even for value added)
- Develop a network beyond distribution, which could include: who to partner with such as a co-packer, for packaging, etc.
- Intermodal Transport and finding a partner outside of AB was something to follow-up on for one business.
- Warehousing was not addressed? (for small volumes, which also provides picking orders capacity)
- Manufacturers – who has more opportunities to utilize plant capacity, so others could toll process or co-pack.
- Communications – Why is it so hard between producers and transport contacts?
- How do we bridge the gaps?
- There are services to assist with everything, how do we do it? Sift through everything?
- Do associations have a role in negotiating with carriers (transport)?

- What are the geographical constraints for transport?
- Is there a government policy with a percent of local for public institutions required?
- Back up distribution if our distributor get sick.

Who do you need to connect to?

- Small scale specialty retail store. In Winnipeg Vic's Fruit Market was 70% MB grown, for example. What other specialty retail outlets do we have in AB to connect with?
- Trade Show – small manufacturers with target to attract buyers from small/independent grocery stores, health food, etc. looking for new things or exposure to local suppliers. Identify the value for the participants and build the process to match.
- Awareness of players in the chain. What type of listings do we have access too, to create social networks?
- Distributors – who is looking for or represents one looking for unique or to expand availability of local.
- Carriers are already talking to *Chefs* and to *Retail*. Producers don't necessarily have to be doing this. (value chain)
- Farmers markets can consolidate for pick-up. Large market pilot.
- Keep carriers in mind for pilot projects.
- CSAs in Alberta.
- Logistics - "I am available".
- Can't do what we are doing, building on farm. Need to connect.

What is one action you will do or take after participating today?

- Create a network, starting with who we met today. Join Linked In group on Food Manufacturing Group and invite other AB producers/processors to join from our table group.
- Explore relationships with groups who want to work together.
- Somewhere for producers to go to in order to get information. For example link from many websites, like the value chain database.
- Develop a "100 Mile Market" idea for Central Alberta. If we bring the parties together, the logistics will be worked out.
- List of distributors/brokers, etc. by region.
- Education on: local food, seasons, food safety. Get information on the Canada GAP program.
- Education on economic benefits and spin offs. Example, 50% of consumers see this as a reason to buy local.
- Sit back analyze, put dots together and move forward. Start local to learn then export.
- Use common distributor.
- More aware of local producers, make more effort to buy locally produced goods.

What do you need to move forward?

- Time, money and hard work.
- This was a good start, next step build in more coffee break lengths and possibly a table top display for networking – build in time in the agenda for participants to stand up and share about their business.
- We need a committee, money and a plan to develop a marketplace where producers and consumers meet. (Virtual marketplace).
- Government funding available?
- Require expertise between the two ends (e.g., producer/buyer). No time if making the product.
- Issue, producers' need to scale up or build capacity, but don't have the support to scale up.

<u>**Wrap-Up**</u> ***(All tables)***

Briefly comment from each group on what action may have been decided and what the day was like for them? Share any last minute thoughts.

- Great information and a chance to talk, create relationships.
- Cooperation and working together.
- Consolidation to reduce costs.
- Working together to have one distribution plan.
- Need for integrity
- Relationship, pull together producers and logistics providers.
- List of distributors by region.
- Local food, re seasonality
- Education that local food is safe.
- Educating consumers that local will help the community.
- Challenge selling outside of retail and farmers market.
- Opportunities regarding back hauls.
- Need to make some connection.
- Networking created today and how do you move this forward.
- Linkedin.com (i.e., a food manufacturers group.)
- Local food safety and education that is needed.
- More discussions on how to work together.
- Developing a local brand
- Chain restaurant - not federal or if they want to buy local find it a challenge. However, sometimes if short will call local supplier.
- Committee to develop a market place so people can get connected.
- People need to know where they are from.
- Need someone to help put pieces together and streamline.

(Submitted by Margurite Thiessen; Revised)