Beyond the Market

A Regional Food System Assessment & Value Chain Opportunity Analysis

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Submitted by:

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to:

Beyond the Market: Growing the North

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Omineca Beetle Action Coalition

Regional District of Fraser-Fort George

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Beyond the Market: Growing the North aims to build, strengthen, and diversify the agriculture and food service industries from Valemount to Terrace in British Columbia, Canada, linking farmers, ranchers, purchasers and consumers in the region in an effort to identify the barriers to the local food industry and encourage collaboration and entrepreneurial development to overcome them.

Beyond the Market is a collaborative partnership between Community Futures Fraser-Fort George, Community Futures Nadina, Community Futures 16-37, the Omineca Beetle Action Coalition, the Regional District of Fraser-Fort George, and the Community Futures Rural Economic Diversification Initiative.

Beyond the Market project activities:

- Create an inventory of food producers, distributors, commercial consumers and value-added processors in the region
- Identify existing food storage and distribution infrastructure.
- Assess the feasibility of a regional food distribution system and value-chain opportunities
- Bring producers and purchasers together to network and share information
- Implement local food purchasing pilot projects in commercial institutions
- Host networking and learning events, including a large regional procurement event
- Identify potential new markets and value-added ventures
- Communicate and share the project learnings

Acknowledgements

Thanks to those who contributed so generously of their time and insight. Special thanks to Ian Ricketts of Bulkley Valley Wholesale, Dean Allen of Summit Camps, Allan Biegansky of Vanderhoof Co-op, Garry & Wendy Lowe of Twin Meadows Organics, Karen Kellett of Northern Farm Products Ltd., Denise Dowswell of Little Valley Farms, and Mike Nowlett of Kawano Farms.

Executive Summary

Overview

This report investigates and assesses the existing regional food system across the Highway 16 corridor from the Kitimat and Bulkley Valley in the west across to the Robson Valley in the east. The purpose is to identify opportunities for strategic collaboration in building a more effective marketing, storage and distribution system for the region. The report also analysed value chain opportunities which should be developed in order to strengthen the regional food economy.

This study focused its attention on market segments with developing local food procurement practices. The Regional Food Expo provided an opportunity to interview attending producers, potential buyers and policy makers. The existing Beyond the Market producer survey was used to follow up with producers and to identify a core contingent of buyers with existing or under development local food procurement practices. These buyers were interviewed in order to understand their meat and their produce buying preferences, volumes and distribution requirements. The buyers also provided valuable insight into opportunities within their area and across the region.

Regional Food System Assessment

Meat, mostly beef production, is well established with significant production volumes across the region. Processing capacity is operating at less than full year-round capacity with peak processing demand in the fall and early winter months. Vertical integration into the local market is somewhat lacking although consumer demand for local food has increased interest from local restaurateurs and retailers. Findings established that opportunities in the hotel restaurant sector align reasonably well with meat production volumes.

The majority of vegetable and berry producers grow a large variety of crops on a small scale. A small number of commercial producers have their own packing, grading, storage and delivery systems. Produce production volumes in the region are generally better aligned with restaurant volumes than with institutional volumes. A few vegetable producers, whether conventional or organic, are capable of supplying consistent quality and volumes at competitive pricing to wholesale and institutional customers.

Best Practices from Other Regions

University of Victoria's Local Food Procurement Policy and Process

Policy:

1. Request for Proposals for Produce that Incorporate Greenhouse Gas Emission Impact
2. Quadruple Bottom-Line Acquisition – includes People, Planet, Profit and Socio-Cultural considerations. These factors are calculated by examining changes in direct and indirect costs and savings, considering impacts on environmental quality, social well-being and economic prosperity.

Process:

1. Clear descriptions from Suppliers include exact place of origin and whether directly or secondarily sourced
2. Multi-Sourcing with staggered contracts, stand-alone tenders, smaller contracts and purchasing autonomy by food service managers and chefs up to $2,500

Value Chain Opportunities

1. Rio Tinto's local procurement policy provides an excellent opportunity to facilitate the development of a Beef Value Chain by convening Rio Tinto's economic development manager and food service contractor, local processors and producers with appropriate expertise, finishing capacity and volumes. This is a potential $100,000/yr. opportunity.

2. Build a local/sustainable menu that can be offered to hospitality and catering industry clients. This request was brought forward during the course of this study by the hospitality and catering industry in Prince George but would be of interest to others across the region. Potential value $150,000/yr across the region.

3. Capitalise on the lessons learned with a Rio Tinto Beef Value Chain and establish similar linkages with other regional purchasers in order to increase the number of animals finished and processed within the region, thereby capturing maximum economic value. Potential value to supplying 10% of the beef consumed is $3 million/yr.

4. Coordinate communication of projected regional produce availability and prices early in the year in order to capture local bulk buying market(s). Issue a weekly "Fresh Sheet" during the season. Example in **Appendix E.** Potential value is $15,000/market.

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1. Introduction

The purpose of this report is to investigate and assess the existing food distribution systems across the Highway 16 corridor from the Kitimat Stikine, Bulkley Valley through to the Robson Valley with the view to identifying opportunities for strategic collaboration in building a more effective marketing, storage and distribution system for the region. The secondary purpose of the report is to analyse value chain opportunities which should be developed in order to strengthen the regional food economy.

The first section of the report provides an overview of the existing food production, processing and distribution system and outlines the challenges faced in local supply procurement. A regional food system Strength, Weakness, Opportunity and Threat (SWOT) analysis is included in this section.

The second section of the report examines Best Practises from other areas with regard to the main issues for the region: institutional purchasing, collaborative distribution, the possibility of Geographic Indicator status to develop a verifiable market identity, and attracting and retaining new growers using various mentoring and apprenticeship programs.

An overview of three major and one minor Value Chain opportunities are presented in the third section. These opportunities are referred to in the Opportunity Analysis of the second section and again in the Recommendations for Implementation in the final section.

1.1. Methodology

The existing producer survey completed by the Beyond the Market project (59 farm businesses completed the survey) was cross-referenced with other known producers across the Highway 16 corridor. Interviews were conducted by telephone, email and in person with several commercial sized farmers and ranchers, all three meat processing facilities and a selection of restaurants, catering companies, grocery stores and institutions previously identified as existing or potential purchasers of local food products. Interviews with producers were undertaken in order to verify the information collected in the producer survey and to extract information with regard to regional purchasers of local food, preferred distribution options, and producer contacts not included in the survey. Interview questions for the purchasers and lists of respondents are included in **Appendix A**.

2. Regional Food System Assessment

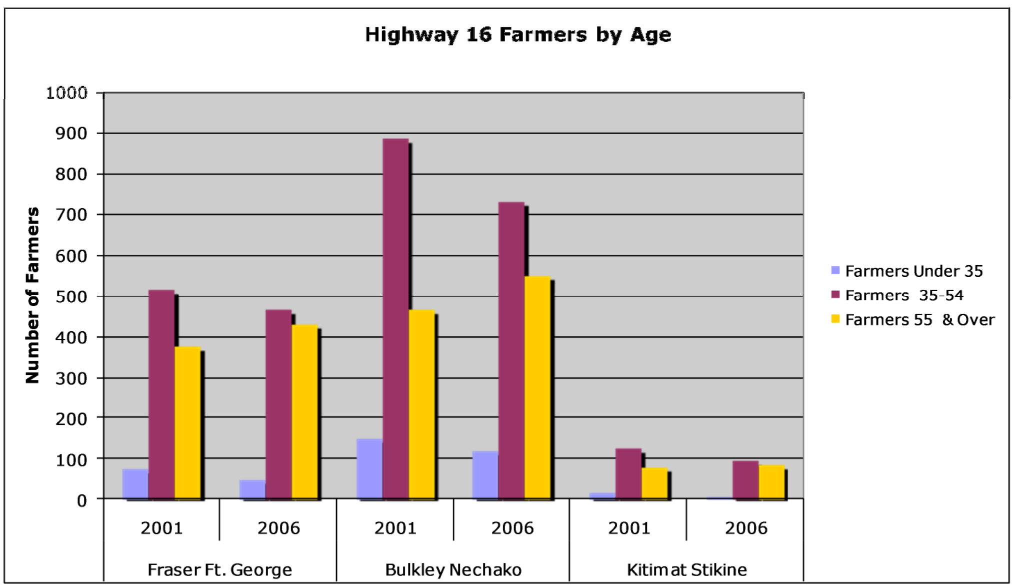
2.1. Current Food System –Agricultural Producer Demographics

The number of farms and farmers is declining across the Highway 16 corridor as well as in Canada. The number of farmers along the Highway 16 corridor declined by more than 4% between 2001 and 2006. This is less than the Canadian average of 5.5% for the same period.[1]

2.1.1. Age

Farmers across the Highway 16 corridor are part of the aging trend of farmers across Canada and British Columbia. The average age of BC farmers was 53.6 years in the 2006 census. The average age of farmers in the Fraser Fort George and Kitimat Stikine regions is 54 years old and 52 years old in the Bulkley Nechako. In simple terms, there are six times as many farmers over 55 years old as there are farmers under 35 years old in the region. The average age of farmers across the Highway 16 has increased since the previous census in 2001.[2]

Figure 1 Highway 16 Farmers by Age



[1] Statistics Canada, 2006 Census of Agriculture, Table 8.1 Characteristics of Farm Operators, http://statcan.gc.ca/pub/95-629-x/8/4182944-eng.htm

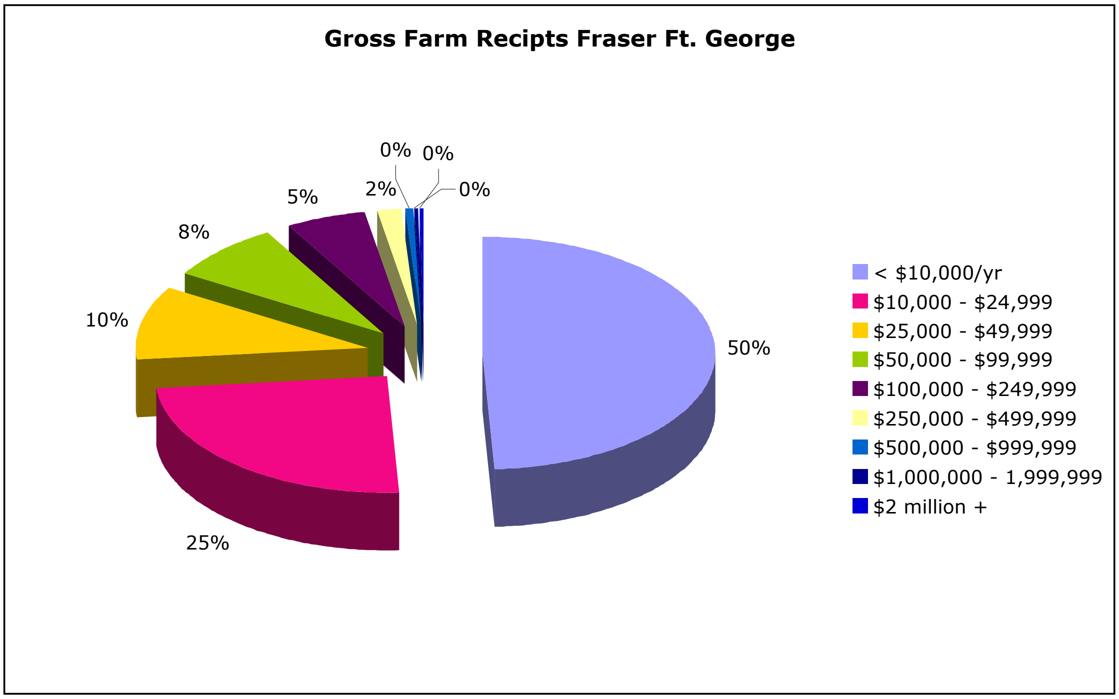
[2] Statistics Canada, 2006 Census of Agriculture, Number of Farm Operators by Age, Tables 8.4-1 to 8.4-4, http://statcan.gc.ca/pub/95-629-x/2007000/4182410-eng.htm#8.5

2.1.2. Income

More than half of farmers across the Highway 16 corridor have less than $10,000 in gross farm receipts while ten percent have gross farm receipts over $100,000[3]. The BC provincial average is 50% of farms with gross farm receipts less than $10,000 but 18% of B.C. farms with over $100,000.[4]

The differences between the Fraser Fort George, the Bulkley Nechako and the Kitimat Stikine are shown in the three following graphs.

Figure 2 Gross Farm Receipts Fraser Ft. George



[3] The census definition of **gross farm receipts** (before deducting expenses) includes receipts from all agricultural products sold and program payments and custom work receipts.

[4] Statistics Canada, 2006 Census of Agriculture, Farms Classified by Total Gross Farm Receipts, Tables 7.6-1, http://statcan.gc.ca/pub/95-629-x/7/4124713-eng.htm#59

Figure 3 Gross Farm Receipts Bulkley Nechako

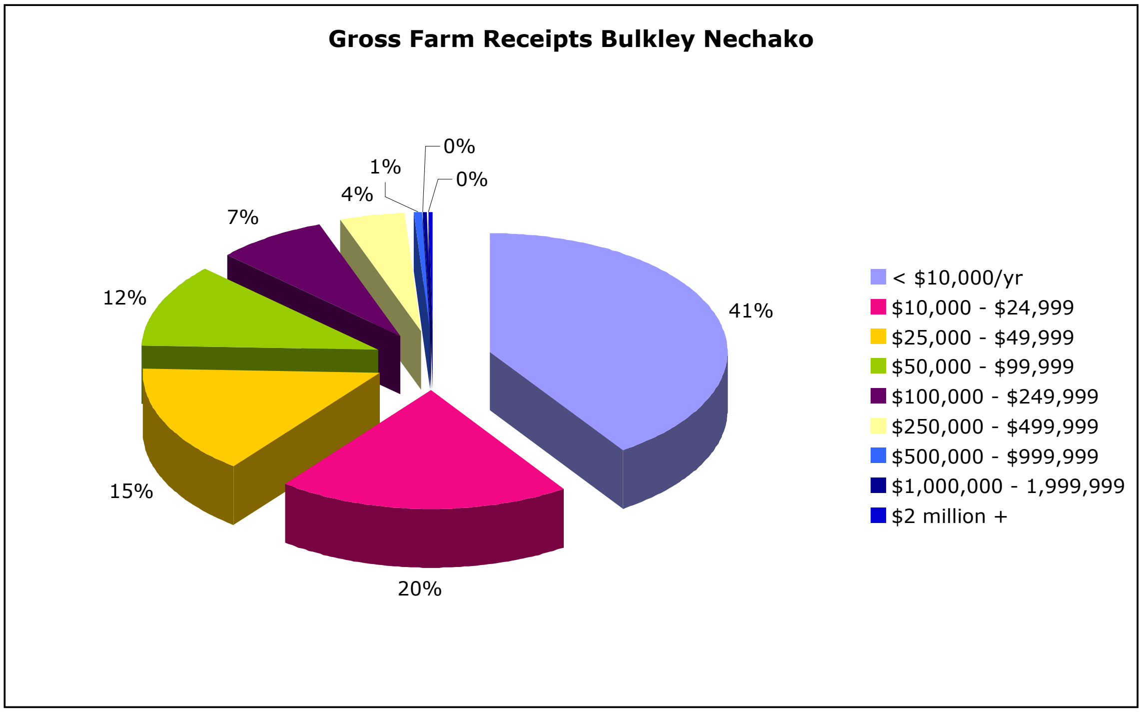
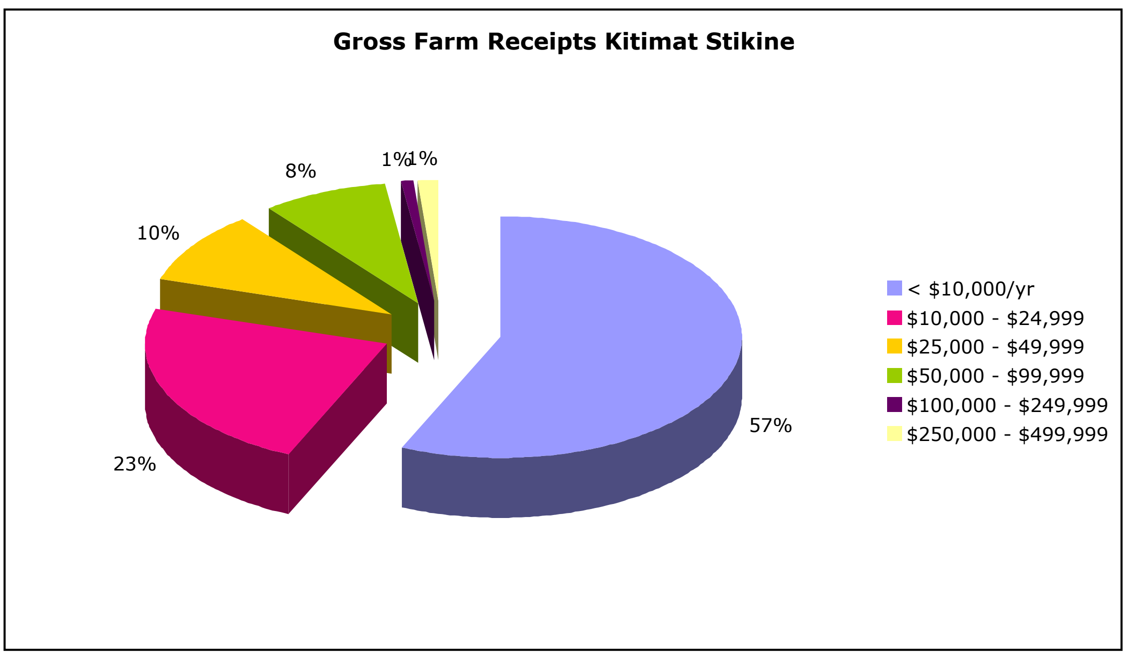


Figure 4 Gross Farm Receipts Kitimat Stikine



The distribution of the gross farm receipts indicates four major points:

1. the large percentage of low gross farm receipts indicates substantial barriers to the economic viability of farming
2. farmers and ranchers are relying on off-farm income to remain economically viable

3. yet the existence of more than 150 farmers with over $100,000 in gross farm receipts suggests that farming can be economically viable in this region
4. it is encouraging to note that the number of farmers with over $100,000 in gross farm receipts rose marginally between 2001 and 2006

2.2. *Current Food System*

This study focused its attention on market segments with developing local food procurement practices. Initial findings established that opportunities in the hotel restaurant sector align reasonably well with meat production volumes while produce production volumes are better aligned with restaurant volumes than with institutional volumes. The analysis of the current food system is broken down within the meat/livestock and the produce sectors by production, processing, purchasing and distribution.

2.2.1. Livestock Production

Beef production dominates the Highway 16 corridor both in number of producers and volume of production.[5] Using the BC equivalency factor of 10 lambs/beef cow and 100 chickens/beef cow, beef cows outnumber all other animals together thirteen-fold.

The numbers in **Appendix B,** Table 2 represent both cow and calf units so the cow numbers would total approximately 22,000. As cow numbers have dropped substantially in B.C. over the past few years, it is likely that for 2012, the total numbers for these regions will be 30% less or in the range of 15,000 cow units. Most beef producers in the region are cow/calf producers who sell the majority of their calves in the fall to feedlots outside of the province. There are however a few large producers in the region who have the capacity for finishing beef locally. The Vanderhoof area is well suited for grain finishing.

> There are three large finishing operations in this area that could easily supply the entire region with a consistent quality, year round grain finished product. Finishing beef locally for the local market returns 73% more value to the region than shipping liveweight beef for finishing elsewhere.

Maintaining a year round consistent supply of quality forage-fed beef is more challenging than producing a grain finished product. However, as consumers become more health conscious, there well may be an increase in demand for grass-finished beef.

> The entire Highway 16 corridor from Smithers to Prince George is well known for its forage production. This makes back-grounding and grass-finishing a potential opportunity.

Note: Back-grounding is the period between the calf being weaned from the cow to being put on a finishing ration for the last 30-90 days. During the back-grounding period the animal grows in frame on a predominantly forage based diet which is lower in energy than a finishing ration. From

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[5] Statistics Canada, 2006 Census of Agriculture, Farm Data and Farm Operator Data Tables, Livestock, Poultry & Bees, http:// statcan.gc.ca/pub/95-629-x/2007000/4123849-eng.htm

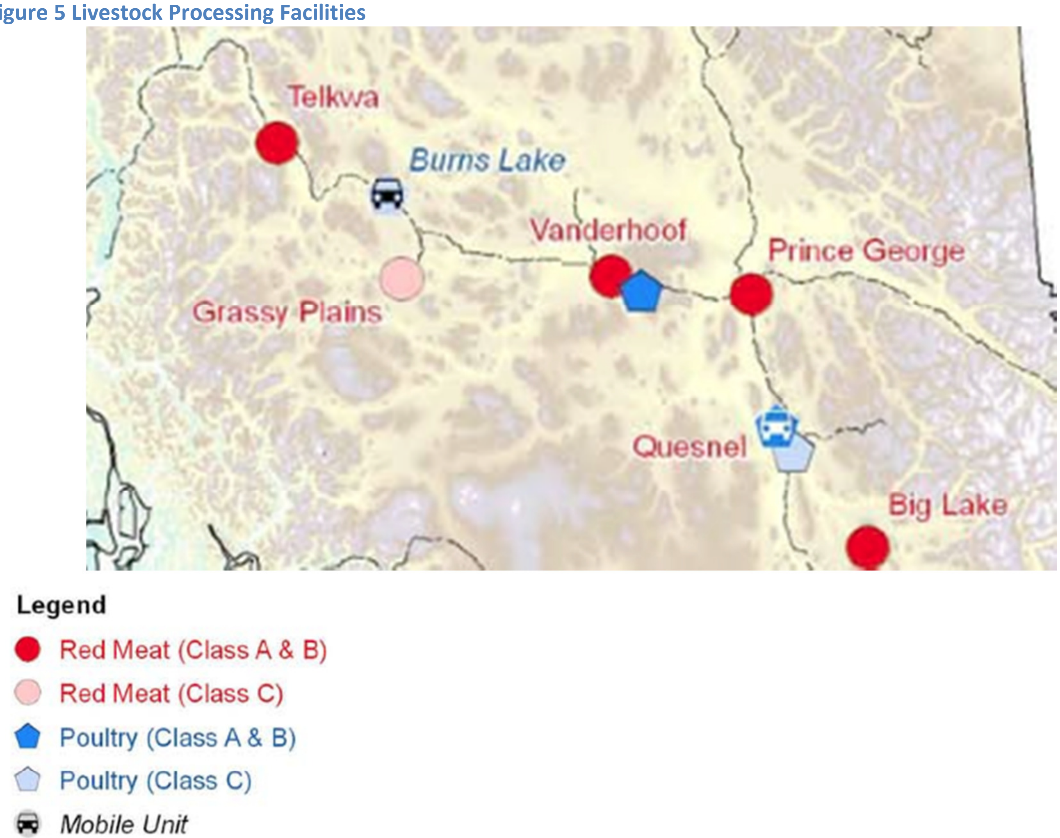
the back-grounding stage, the animals can either be finished on forage (grass-finished) or finished on a grain ration with a small amount of forage (grain finished)

2.2.2. Livestock Processing

There are three provincially licensed red meat processors and one poultry and rabbit processor which serve the Highway 16 corridor between Telkwa and Prince George. There are two Transition "C" licensed poultry and rabbit processors, a stationary unit in Quesnel and a mobile unit in Burns Lake.[6] There is also a mobile poultry processing unit based in Quesnel which had limited operation in 2011.

For beef processing, the three main plants are Kawano Farms in Prince George, Country Locker in Vanderhoof and Northwest Premium Meat Co-op in Telkwa. The kill capacity of the first two plants is estimated at approximately 3,400 beef per year. Collectively, they are currently operating at approximately 45% of capacity, or 1,530 beef per year. The Northwest Premium Meat Co-op in Telkwa is a kill plant only, although they operate closely with a cut and wrap. We were unable to obtain current capacity or operating levels for this plant.

Figure 5 Livestock Processing Facilities



[6] BC Centre for Disease Control, Provincially Licensed Class A, B and C Meat Plants Pursuant to the BC Meat Inspection Regulation as of November 28, 2011, http://www.bccdc.ca/NR/rdonlyres/161B504B-8E5D-43BA-B111-684DA64996C6/0/MeatPlantEstablishment_ABCWEBVERSION.pdf

2.2.3. Meat Purchasing

The majority of local beef and lamb produced and processed in the region is sold directly to end consumers in bulk packs or is sold on a carcass basis to wholesalers in the lower mainland. Small volumes of local beef have been purchased by local caterers, independent restaurants, as well as the Prince George Civic Centre but volumes are inconsistent and too limited to identify trends or be tracked.

Most of the grocery retailers within the province require their meat products to be processed by a federally licensed plant. As there are currently only provincially licensed red meat plants operating within B.C., there is limited access to the retail sector for B.C. produced and processed meat products.

> The greatest opportunity for increasing sales of locally produced beef products within and across the region is the camp and catering sectors, namely Rio Tinto and other natural resource companies as well as the hotel sector and the Prince George Civic Centre.

Table 1 Potential Local Meat Purchases by Camps, Retail Grocers, Caterers, Restaurants and Institutions (lbs./mth)

Potential Local Purchases lbs./mth	Bulkley Valley	Vanderhoof-Burns Lake	Prince George	Robson Valley	TOTAL
Beef	16,020	0	0	0	16,000
Beef Prime Rib		0	700	125	800
Beef Tenderloin		0	475	25	500
Beef Rounds	200	0	4,700	100	5,000
Custom Saus. or Patt		0	4,000	0	4,000
Lean Ground	200	0	4,200	200	4,500
Poultry	3,200	300	0	300	3,500
Pork	2,400	0	0	100	2,500
Whole Beef Mkt Wt Carcasses		0	70	0	70

A total of eleven restaurants, two grocery stores, two camps, two hotels and one institution provided estimates of their monthly meat volumes which they would be willing to buy locally. The projected total amounts to 125 dressed carcasses each month. This is within the current processing capacity of the Kawano Farms and Country Locker. A few of these buyers indicated that they would be willing to pay an average of a 10-15% more than they are currently paying.

> The 2015 Canada Winter Games is an opportunity for local producers, processors and caterers to work together to showcase the region's beef products and gain recognition and traction in the market place.

2.2.4. Meat Marketing Logistics

Most of the commercial food service clients purchase beef and lamb by the individual cut, rather than on a carcass basis, custom cut to their needs. The challenge in supplying these clients is to plan and balance the future sales of the various cuts with the relative volumes that are produced from each carcass. If this is not done effectively, the middle cuts will sell out quickly and the producers will be left with a large inventory of hip meat, grind and front end cuts that are more difficult to sell at viable prices.

Appendix C lists the standard primal cuts and weights that are produced by one beef animal. In order to obtain full carcass utilization, particularly in the early market development stage, the sales person needs to be creative in finding markets for each of the primals in a balance with the number of animals to be processed each month. This will involve meeting with several buyers and planning purchase volumes for the various cuts over the following year. Many of the front end cuts can be marketed as named ground products (ground chuck) and will yield an equal or higher price than if left as a primal.

The hip cuts and ground products will need to be marketed to volume buyers such as hotels, institutions and camps as these are the highest yielding cuts from each carcass. The rib and loin cuts can be marketed to smaller, high-end restaurants as these relative volumes per carcass are much less and the price/kg is much higher. Specialty markets will also need to be developed for the offal and bones, in order to obtain full carcass utilisation and maximise value per animal.

2.2.5. Meat Distribution Channels

Clarke Freightways is the most commonly used carrier for both local and long distance shipping of frozen beef products by the pallet, where the producer requires shipping only.

Three major meat distribution companies service the food service sector. Gordon's Food Service and Centennial Meats both require meat products from federally licensed plants. Sysco Kelowna is the only large-scale distributor that has implemented a local procurement policy. They do purchase meat from provincially licensed plants. They are working on developing relationships with commercial meat producers within their operating region. Their current ability to implement this local procurement policy has been affected by an apparent staff shortage.

It often becomes viable to lease or purchase a reefer trailer, camper or delivery van when a producer's monthly sales volumes exceed 15 animals per month. This will enable timely local deliveries, a closer control on marketing and improve customer service. The majority of food service managers surveyed prefer to have the products delivered by the producer representative, rather than a trucking or distribution company. An Income and Expense projection for a marketing and distribution enterprise is included in **Appendix D**. In this projection, the sales person would also be the driver and could be the producer or someone hired by the producer.

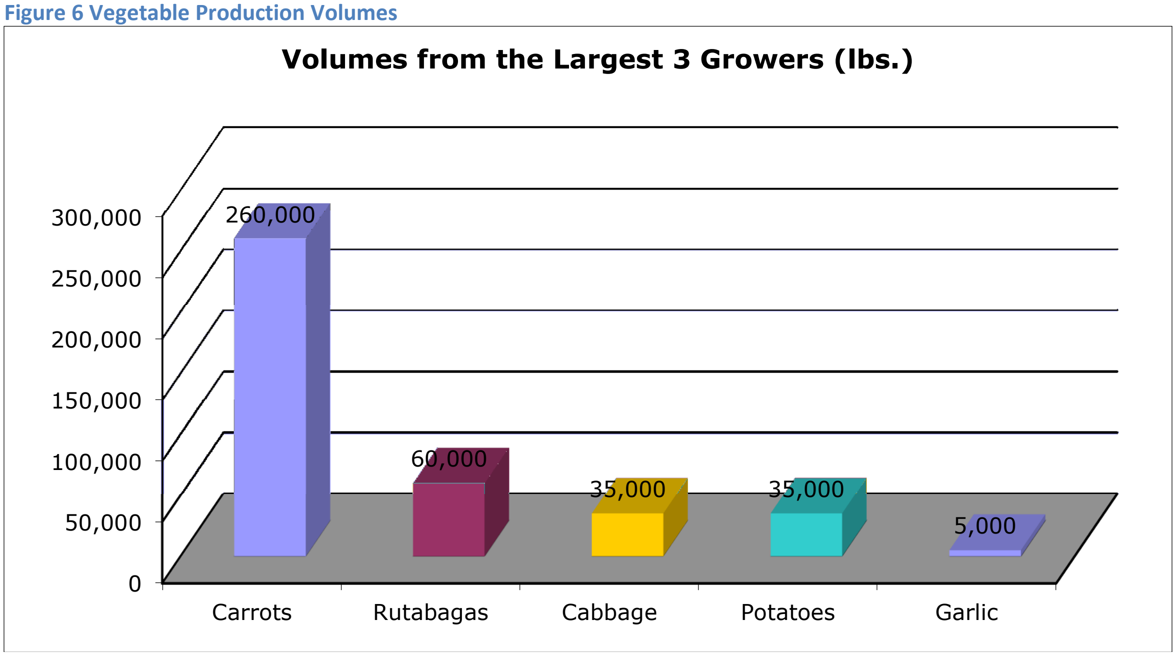
> The purchase of a refrigerated delivery van is an opportunity that may be viable through regional capital cost collaboration.

2.2.6. Vegetable & Berry Crop Production

Relatively few horticultural producers produce the majority of the vegetables and berry crops in the region. The major vegetable crops by acreage are potatoes, carrots, cabbage, beets and lettuce but the major crops by volume produced by the three biggest growers are carrots, rutabagas, cabbage, potatoes and garlic. There is nominally more acreage in raspberries and strawberries than in saskatoons.[7]

According to the 2006 Census of Agriculture, there is a total of 355 acres of vegetable and berry production across the region. This includes a substantial acreage of potatoes in the Kitimat-Stikine region but the researchers were unable to identify and contact any Kitimat growers to confirm these numbers.

Figure 6 Vegetable Production Volumes



The acreage of most crops is relatively small with the 2006 Census reporting a total of 20 acres of carrots for Fraser-Fort George, 2 acres in the Bulkley-Nechako and 3 acres in the Kitimat-Stikine. This supports the findings from the 2011 Producer Survey which revealed that the majority of vegetable and berry producers grow a large variety of crops on a small scale.

2.2.7. Produce Season Extension

Half of the vegetable and berry producers have some season extension capability through existing greenhouse capacity. Few growers have commercial sized greenhouses with only two growers having more than 3,000 sq ft under plastic. The growers contacted (those selling to restaurants) expressed interest in learning about better season extension techniques. Basic

[7] Statistics Canada, 2006 Census of Agriculture, Farm Data and Farm Operator Data Tables, Crops, http://statcan.gc.ca/pub/95-629-x/2007000/4123849-eng.htm

season extension information is contained in this article from Mother Earth News http://www.fourseasonfarm.com/pdfs/garden_for_all_seasons.pdf

2.2.8. Produce Packing, Grading, Storage

Vegetable and berry producers in the Highway 16 corridor who wish to increase their sales to restaurant, wholesale or institutional customers will need to adhere to the Packaging and Labelling Requirements for Fresh Fruit and Vegetables (http://www.inspection.gc.ca/english/fssa/frefra/qual/fruveglabetie.shtml) as well as the Canadian Grading standards laid out in the Fresh Fruit and Vegetable Regulations (http://laws.justice.gc.ca/eng/regulations/C.R.C.,_c._285/page-19.html#h-27).

Distributors known for mentoring producers have contributed greatly to the growth and profitability of their growers. Discovery Organics in Vancouver and Bulkley Valley Wholesale in Smithers are both highly recommended by their growers. Packing and grading facilities are variable across the region with most commercial scale produce growers having on-farm facilities. The Robson Valley is the only area that reported insufficient producer storage capacity.

2.2.9. Produce Purchasing

There are independent restaurants and hotel restaurants, catering companies, wholesalers, distributors and retail grocery stores buying from local produce growers across the Highway 16 corridor. Several of these buyers have relationships stretching back years or even decades with the same growers. Produce is also purchased from distributors such as GFS and Sysco, as well as wholesalers and retailers in the community. Retailers reported that the market response to local produce has exceeded their projections significantly. This has enhanced their willingness to try new products and to work with new growers.

Requirements to plan for supplying this market are:

- Send a weekly email or fax of available product
- Pack orders in food grade boxes/containers
- Properly chill the product so that it arrives without any field heat and stays fresh in the cooler
- Have a product recall strategy
- Have your water tested annually

The volumes that the various purchasers are buying vary considerably. In general, independent restaurants and catering companies purchase by the individual case while the largest buyers are buying pallet or multiple pallet quantities (2,000 lbs.) on a weekly basis.

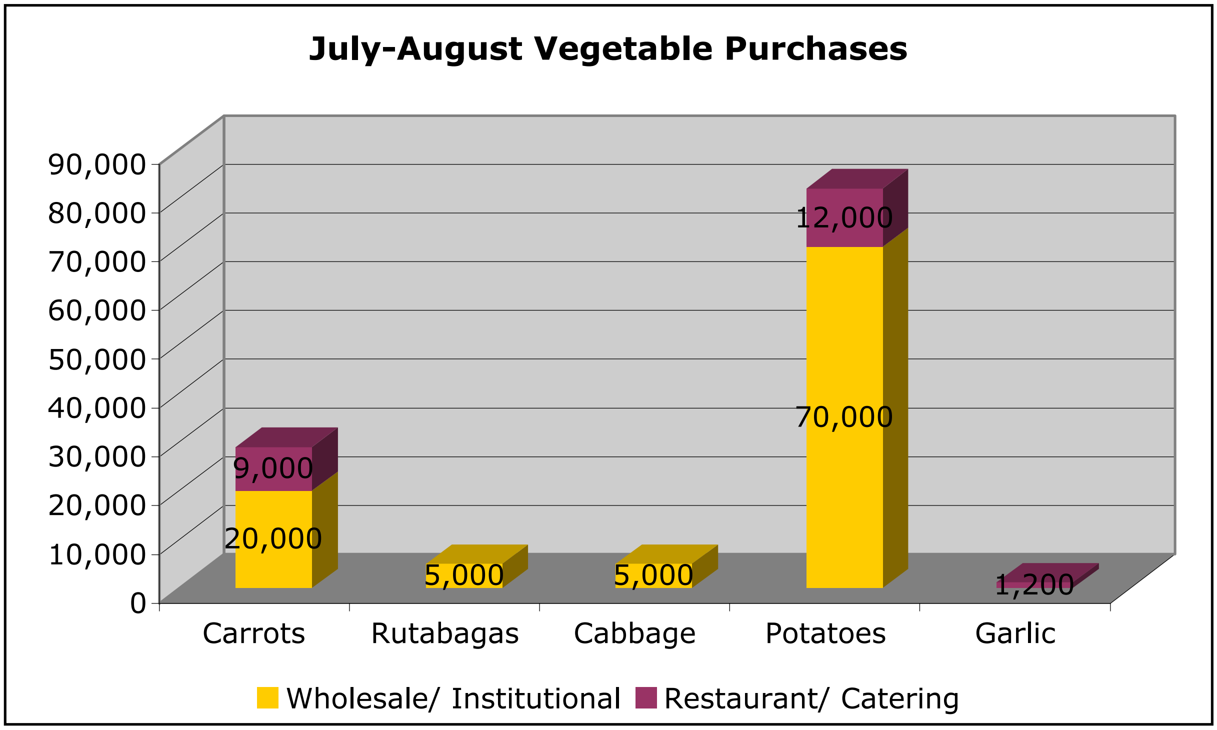
The prices that the various purchasers are paying also vary considerably depending on distance, volume and time of year. Wholesale price reports are listed in **Appendix B**. The following table identifies the purchasers surveyed by weekly purchase volumes (all produce, locally sourced and beyond).

Table 2 Surveyed Produce Purchasers by Volume

Region	Pallet Quantities	Case Quantities
Smithers	BV Wholesale	Eddyline Bistro Café Trackside Cantina Two Sisters Catering
Vanderhoof - Burns Lake Corridor	Vanderhoof Co-op	Gwyn's Green Grocer New Leaf Health Food & Café Redfern's Coffee House
Prince George	UNBC	Cimo's Coast Inn of the North Prince George Civic Centre Sassafras White Goose Bistro
Robson Valley		Beanery 2 Bistro Cariboo Grill Dunster General Store The Gathering Tree Jasper Park Lodge Swiss Bakery Tekarra Restaurant

Figure 7 shows the average total volumes purchased in the summer months of July and August relative to the five crops grown by the three largest vegetable growers. It must be noted that this does not include volumes purchased by UNBC, a major purchaser in the region from September to April.

Figure 7 Summer Vegetable Purchases



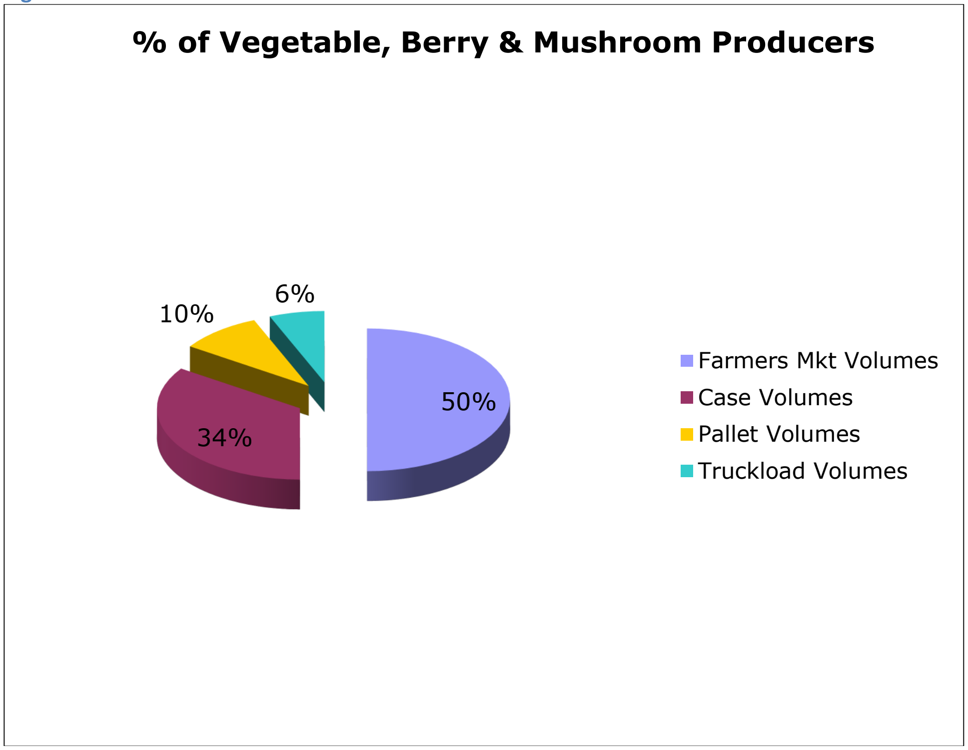
2.2.10. Produce Distribution Channels

The majority of producers are selling almost exclusively through the region's Farmers' Markets, although a small number also sell through a subscription box program or direct to restaurants. There are a small number of producers who ship pallet or partial truckload quantities into the Prince George market, either with their own delivery vehicle or through one of the commercial carriers. Those producers who regularly ship to the Vancouver market use commercial carriers, usually Clarke Freightway.

The 2011 Producer Survey revealed that 29 out of 33 vegetable and berry producers sell 75% or more of their produce through farmer's markets. This was confirmed through producer interviews and group teleconference.

Four of the identified vegetable producers are selling wholesale volumes. Of these, two are interested in expanding their production volumes and wholesale and restaurant sales. This will be explored further in the Value Chain section.

Figure 8 Local Produce Sales Distribution



2.3. *Strengths, Weaknesses, Opportunities, Threat Analysis*

Strengths

- Beef production and processing capacity in excess of regional market demand
- Existing local procurement policies (BV Wholesale, Rio Tinto[8])
- Current development of local procurement policies by additional institutional purchasers (UNBC, PG Civic Centre, Canada Winter Games 2015)

Weaknesses

- Average age of producers in the mid-50's, few producers under 35 years old
- Lack of federal inspection which is required for meat sales into the Overwaitea Foods Group, Gordon's Food Service (a hotel, restaurant and food service supplier) and the Jasper Lake Louise corridor (across provincial boundary)
- Complexity of balancing various market demands in order to facilitate full carcass utilisation on an ongoing basis.
- Gaps in knowledge and facilities for fruit and vegetable production, post-harvest handling, and marketing were identified by retail and restaurant buyers as well as

[8] http://www.procurement.riotinto.com/documents/Rio_Tinto_Procurement_principles_EN.pdf

experienced commercial growers across the region, e.g. how to assemble a sample case for presentation, how to develop an availability blocking chart (produce)
- Lack of easily accessible distribution routes, frequency, and costs.

Opportunities

- **Assist large buyers, such as Rio-Tinto Alcan, in establishing supplier networks** to support local procurement policies. Kevin Dobbin, BC Coordinator for Regional Economic Development would benefit from assistance in facilitating local food procurement through Rio-Tinto Alcan's contractual relationship with ESS Compass and local beef suppliers and processors. Gillian Watt of Thompson Rivers University is available to facilitate the development of regional beef value chains throughout the Interior of B.C.
- **Prince George – Build a local/sustainable menu** to offer catering clients by facilitating an early 2012 meeting between large catering operators and large meat and horticulture operations based on a match of appropriate volumes, quality and consistency of supply. Interested participants may include: Jorge Soares, Executive Chef at the Prince George Civic Centre, Mike Noullett of Kawano Farms (red meat processor), David Kellet of Northern Farm Products (root vegetables), Robert Bucher of P & R Farms (organic vegetables and berries) and Phil Myatovic of Cariboo Growers (cole crops, leaf & root vegetables).
- **Prince George – Leverage building the local/sustainable menu experience** to enhance production, processing and marketing by facilitating further meetings with other purchasers. Interested participants include: Sean Rankin at Coast Inn of the North, Gary Barnes at the Ramada's Coach's Corner, Dean Russell at UNBC, and decision makers for catering the 2015 Canada Winter Games - Colleen Van Mook, Director of Community Services for the City of Prince George, Myles Tycholis, Events Manager of the Prince George Civic Centre and Stuart Ballantyne, CEO of the Canada Winter Games.
- **Bulkley-Nechako - Finishing and processing beef calves within the region has a revenue multiplier of 2.7 times compared to shipping live calves outside of the region.** In comparison, selling a 600 lb. live calf at $1.30/lb outside of the region yields a return of under $800 as compared to finishing and processing the animal within the region which returns almost $2,900/animal at wholesale prices. This extra $2,100/animal keeps working in the community, contributing to economic activity and supporting regional infrastructure. Detailed analysis in **Appendix C** – BC Beef Food Service Primals
- **Bulkley-Nechako – Capital cost sharing of a refrigerated, coordinated delivery vehicle** will enable timely local deliveries, a closer control on marketing, and improve customer service to restaurants and retailers. It becomes viable to lease or purchase a reefer trailer, camper or delivery van when a producer's monthly sales volumes exceed 15 animals per month. The majority of food service managers surveyed prefer to have the products delivered by the producer representative, rather than a trucking or distribution company.

- **Robson Valley – Develop a local bulk fruit and vegetable Buying Club** through the Dunster General Store with coordinated offerings from local growers on a weekly availability sheet throughout the growing season and including storage vegetables in the fall/winter. A freight advantage of $4,000 should be realised based on recent annual volumes. Local coordinated bulk fruit and vegetable sales would have the additional advantage of regularity and would reduce the "element of surprise" in delivery timing with the existing arrangement between the Dunster General Store and the aging Similkameen producer that has been in place for many years.

- **Increase berry and vegetable plantings for wholesale and restaurant sales** by refining production, grading, packaging and delivery to wholesale customers as a way to establish credibility and build capacity to meet the needs of restaurant buyers. Production budgets for 5 acre berry and mixed vegetable operations available at http://www.al.gov.bc.ca/busmgmt/budgets/budget_pdf/small_scale/2008mixedberry.pdf
http://www.agf.gov.bc.ca/busmgmt/budgets/budget_pdf/small_scale/2008mixed%20veg.pdf

- **Connect new and existing growers for mentorship/apprenticeship opportunities** by holding fall or winter producer workshops/seminars across the region and improve skills and knowledge by providing post-harvest handling and market display skills. BV Wholesale has a new manager of local, specialty and ethnic food purchasing in Smithers interested in expanding their local supplier network and willing to work with producers to improve their marketing skills.

- **Provide current wholesale produce pricing information** through a direct linkage between the Beyond the Market website and the Certified Organic Fruit & Vegetable pricelists and the USDA Agricultural Marketing Service Market Reports for wholesale fruit and vegetable pricing (see **Appendix E**).

- **Enhance the viability of the meat processing sector** by developing value chains which will facilitate planning for year round production and processing volumes balanced with seasonal demand. This year round employment will enable the A & B licensed meat processing plants to retain long term skilled labour. Currently, processing volumes are extremely high in the fall months but are insufficient during the remainder of the year to offer year round employment. This restricts access to quality employees.

- **Connect appropriate scale producers and purchasers** by holding fall or winter "Meet Your Maker" workshops across the region. Organiser Bonita McGee at Farm Folk/City Folk in Vancouver has organised three events since 2009 and has developed a successful format that she is willing to share.

Threats

- Lack of intergenerational knowledge transfer as producers retire.

- Failure to attain appropriate production and marketing capacity in time to meet the market demand for local food products.
- Loss of producer clients for A & B licensed processing plants (which impacts their economic viability) and the subsequent reduction of meat processing capacity (including loss of skilled labour) for commercial markets. Unlicensed processing and the introduction of D & E licensed processors has negatively impacted the financial viability of A & B licensed processors.

3. Building a Local Food System - Best Practises

3.1. Institutional Purchasing

The key challenges facing institutions and wholesale buyers as they attempt to increase procurement of local food are consistency of availability and quality as well as cost. The key challenges facing farmers as they attempt to supply institutions and wholesale buyers are adequate volumes, delivery, Food Safe requirements and adequate chilling. Actions to address the challenges identified by both farmers and institutions include revised institutional procurement processes and collaborative actions between institutions, farmers and distributors aimed at changing the systems and improving the infrastructure. In the Highway 16 corridor, only 4 produce growers were identified as capable of supplying a portion of institutional volumes. Of these, two are unwilling to expand their current production but are willing to providing mentoring or apprenticeships.

University of Victoria Case Study[9]

The University of Victoria's (UVic) Food Services is one of the largest purchasing powers on Vancouver Island, with current spending of approximately $5.6 million per year. They finalised a contract in 2008 which commits their distributor to provide at least 29.7% of items produced and supplied by Vancouver Island farmers and 36% of items produced in B.C. (outside of Vancouver Island). As of December 2011, 67% of UVic's bulk items are BC products.[10] The context for UVic's local food purchasing success includes the University's commitment to sustainability and the incorporation of environmental and social considerations into purchasing decisions. The leadership, demonstrated by Ken Babich, Director of Purchasing Services and Rita Fromholt, Sustainability Coordinator, has been instrumental in achieving results. The fact that UVic does not contract out its foodservice made this transition much smoother.

The following factors created the changes to procurement processes, which have resulted in a substantial increase in local food procurement:

Request for Proposals for Produce that Incorporate Greenhouse Gas Emission Impact

[9] Local Food Project: Strategies for Increasing Food Security on Vancouver Island, August 2011
[10] Ken Babich, Director of Purchasing Services, University of Victoria, personal communication, December 1, 2011

2010 brought provincially enforced carbon requirements to UVic, and other public institutions in B.C. As a result, UVic created a mandate to reduce their carbon on certain Request for Proposals (RFP). For example, they changed their produce RFP's to factor in greenhouse gas emissions into the ranking for contract competitions.

Quadruple Bottom-Line Acquisition

The Quadruple Bottom-Line methods and practices, in best value-analysis and evaluation, take into account four main factors. These are People, Planet, Profit and Socio-Cultural considerations. These factors are calculated by examining changes in direct and indirect costs and savings, considering impacts on environmental quality, social well-being, and economic prosperity.

UVic's Food Procurement Process

- Clear descriptions from Suppliers including:
    - Exact Place of Origin
    - Directory or Secondarily Sourced
- **Multi-Sourcing**
    - Stagger contracts
    - De-bundle tenders
    - Smaller contracts so local distributors can bid
    - Food service managers and chefs have food purchasing autonomy up to $2,500

3.2. Collaborative Distribution Systems

A number of informal regional distribution systems exist throughout rural Canada. Organic vegetable producers in the North Okanagan and the South Okanagan/Similkameen coordinate their delivery schedules when supplying to the same restaurants and wholesalers in nearby communities. There are several individuals who purchase Okanagan fruit and vegetables for distribution to the Jasper – Lake Louise corridor, Calgary, Edmonton and Saskatoon markets. Individuals in small communities in the Kootenays make weekly or bi-weekly distribution trips to the Vancouver-Lower Mainland market throughout the summer and fall, sourcing ingredients and supplies for their food processing customers on the return journey. Local Food Plus in Ontario certifies "Local Food" and coordinates delivery schedules to institutional purchasers.

3.2.1. Harvest Moon Local Food Initiative[11]

The Harvest Moon Society formed in 2001 in order to address rural revitalization projects in and around Clearwater, Manitoba. In 2007, they formed the Harvest Moon Local Food Initiative in an effort to create a more local, fair and sustainable food system in Manitoba. Generous funding and community development expertise and support from Heifer International over the 6 intervening years and the involvement of graduate students at the University of Manitoba helped shape the vision, structure and strategies which guide the Local Food Initiative.

[11] Colin Anderson, University of Manitoba, personal communication, http://harvestmoonfood.ca

Initially, a home delivery model was implemented to facilitate access to local food for Winnipeg residents. The home delivery model has been replaced by on-line ordering and a growing network of Harvest Moon Buying Clubs. Growth has been rapid with 6 new Buying Clubs developing over the same number of months in 2011, all by grassroot word of mouth connections.

A website with profiles and videos of the farmers as well as a newsletter and community building events provide education and awareness about the related sustainable and youth projects. Additionally, all the Harvest Moon Local Food Initiative farms have open farms and many of them have specific days where they invite their local food community out to visit the farm and learn more about "their farmers".

3.2.2. Hardwick, Vermont's "Center for an Agricultural Economy"[12]

Twenty-five agricultural business owners near Hardwick, Vermont, started meeting for monthly potluck business discussions in 2004. They recognised that a Value Chain model would benefit their community with its 150 organic farms in a 20 mile radius, an average per capita income of $14,000, and 62% of the children accessing low-income school lunch programs. They also realised that despite the high regional unemployment, 20% of the workforce was involved in value-added agriculture. They identified a lack of collaboration as their biggest risk.

The first joint project that they undertook was for a shared distribution system as a result of a discussion when they realised that several of them were selling and making individual deliveries to the same customer base, necessitating 1-2 delivery days/week for each supplier. That group purchased a refrigerated delivery van and now take turns making the deliveries once every two weeks on a 3 delivery/week schedule. The second joint project was to address community food access by establishing a year round Community Supported Agriculture (CSA) project, led by one of the vegetable growers but sourcing from several area growers. This CSA has 350 members (Hardwick has a population of 3,207), annual sales of over $250,000 and along with area processors, supplies the Community Pantry, available to anyone in the community.

One of the biggest challenges for a quickly growing company was to find capital to fuel growth. High Mowing Seeds created a convertible debt offering which the local restaurant copied when they established their business. In this way, the investors into the restaurant were able to eat their investment over time and the restaurant is able to purchase 80% of its ingredients from within 10 miles.

The agricultural business owners recognised that they could only afford a limited amount of time to address the issues affecting their region, issues ranging from intergenerational transfer of land, commercial food processing, storage and distribution. They established "The Centre for an Agricultural Economy". Since then, a new Food Venture Centre has been built, a Regional Food System plan exists, "Farm to Plate" and "Taste of Place" programs have been established

[12] Tom Stearns, High Mowing Seeds, Personal communication

and a variety of support is available for small agricultural businesses through the Vermont Sustainable Business Development Centre.

Since the initial meeting in 2004, the region has added 125 new jobs, reduced unemployment by 4% and experienced an increase in median income of $10,000.

3.2.3. The Growers Co-operative of the Cariboo-Chilcotin[13]

A small group of people in a Williams Lake started discussions in 2007 around the idea of a retail location linking local consumers to local producers in order to provide broader access to local foods. The city has a population of about 11,000 with area population about 36,000 and a median age of 38. Like other small communities, residents were finding access to locally produced foods challenging.

Community nutritionist Tatjana Bates was instrumental in finding resources to further the project along and joined by farmers, ranchers and local residents investigated the idea of providing a central retail store which could facilitate year round access to local food. The City of Williams Lake was both receptive and supportive and helped the group find suitable retail space.

The co-op is open 3 days/week year-round and sells a selection of meat and produce as well as cheese, honey, baking, pet food, jams, jellies and other processed food. The store is a busy place during “fresh fruit and veggie” box pick-up day and customers can pick-up their pre-ordered produce box or choose from the in-store selection.

The co-operative consists of about 30 grower members with voting privileges and a number of community members who purchase an annual non-voting membership which includes priority on limited quantity items, a monthly newsletter and monthly and yearly draws.

3.2.4. Harvest Moon Natural Foods Cooperative[14]

In 2005, a group of people in a rural recreational area east of Minneapolis, Minnesota voiced the need for their own community market. Year round residents of the area number about 9,500 but the population increases with summer tourism to the Lakes area. The group started meeting to discuss the possibility of a community market in June 2005 and by April 2006, had surveyed local residents, incorporated and formed a steering committee and had applied for and received a $10,000 matching grant for a marketing study. Since then, they have sold over 1,100 memberships at a cost of $175 each, entered into an agreement with the National Cooperative Grower’s Association as a Development Cooperative and opened as a full service grocery in June 2010.

In addition to being a full service grocery focusing on local, natural and organic, they offer a full schedule of community events from First Friday Fairytales (stories and crafts for children on the first Friday of every month), Old Time Music, readings by local authors, “Backpack Buddies”, a

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[13] Tatjana Bates, Interior Health, personal communication, www.cariboogrowers.ca

[14] David Giedd, Harvest Moon Natural Foods Cooperative Inc., www.harvestmoon.coop

local childhood hunger awareness program as well as a weekly Seniors' Discount day. One of the keys to their success to date is a consistent communication strategy.

With the median age of residents in the area at 38 years old, founding members knew that the healthy, natural and organic foods were a prime purchase consideration for the community members. This was confirmed by the marketing study and is a strong attribute in the store's dynamic. The founding members consistently sought information from potential members in the start-up phase and continue to solicit and analyse the information that they receive from their members.

Although most of the co-op's winter organic produce comes from California or Mexico, Harvest Moon buys from local and regional growers and food processors year round and carries as many local products as possible.

3.2.5. Analysis of Current and Potential Capacity for Similar Distribution Systems

The first three of the previous profiles are grower driven while the Minnesota profile is consumer driven. In all profiles, ongoing community consultation and outreach has clearly contributed to their development and success.

Table 3 Comparison of Regional Distribution System Community Profiles

	Area Population	Median Age	Years since Formation	Post Secondary Institute	Development Expertise+/ Funding
Centre for Ag Economy	3,200	36.0	6.5		Yes
Harvest Moon Local Food Initiative	684,000	38.7	4.5	Yes	Yes
Cariboo Growers	36,000	38.0	4.5		Limited
Harvest Moon Natural Food Cooperative	9,500	38.0	6.5		Yes
Terrace	20,000	38.4			
Smithers	5,200	36.1			
Vanderhoof	4,000	34.9			
Prince George	71,000	36.5		Yes	
McBride	660	37.1			
Valemount	1,000	42.3			

The Bulkley Valley has a strong local food proponent in the management at Bulkley Valley Wholesale and the existence of the NorthWest Premium Meat Co-operative. As communication attempts with the NWPMC were unsuccessful during the data gathering and analysis stage of this report, it is difficult to ascertain how strong of a leadership role the NWPMC would be able to maintain in a shared distribution system.

The Prince George area is fortunate to have the University of Northern B.C. with faculty and students who support local food initiatives and are willing to take a leadership role, e.g. the establishment of an on-campus Farmers' Market. Additionally, the City of Prince George administration and Northern Health support the movement towards local food procurement policies. Prince George may be most similar to the Harvest Moon Natural Food Cooperative model which is consumer rather than grower driven.

The Robson Valley has at least two of the essential elements necessary for this type of shared distribution system: the Robson Valley Growers and the Community Summer Produce buying opportunity coordinated by the Dunster General Store.

3.3. Geographic Indicators[15]

A Protected Geographical Indication (PGI) establishes a link between a given product and region. It serves to identify in which specific geographical area the production, transformation or even the development of the product is localized and, in turn, the particular quality, reputation or other characteristic the product is associated with. Consequently, in having their products protected against identity usurpation by a PGI, regions are even more encouraged in their efforts to promote their agriculture and economic development. Other Geographic Indications include Protected Designation of Origin (PDO) (agricultural products and foodstuffs which are produced, processed and prepared in a given geographical area using recognised methods (e.g. Native Shetland Wool) and Traditional Specialty Guaranteed (TSG) products which highlight the traditional character of production or composition (e.g. Emmental cheese)

All products covered by the designation must be certified in accordance with the specifications manual of the PGI. Certification is required in order to sell under the reserved designation. Certification can be obtained by any individual or legal entity performing the milling, breeding, or even the transforming, cutting or conditioning operations. Retail transformers (butchers) are also included. A certification body must be accredited to perform the certification for all markets.

A reserved designation must not be confused with a traditional trade-mark. A reserved designation identifies a product by its origin and its particular qualities. Moreover, it refers mainly to products qualified as being of very high quality.

Charlevoix lamb in Quebec was designated with a PGI in March 2009, the first such designation in North America, a process which took over 10 years and considerable government and industry resources. The Charlevoix lamb designation applies to six producers, whose total volume is insufficient to sustain the cost of the program without substantial ongoing provincial government resources.[16] Other examples of Protected Geographical Indication food products include Darjeeling tea (India), Prosciutto Amatraciano (Italy) and Pate de Campagne Breton (France).

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[15] Charlevoix – The Land of the Lamb!, ROBIC Newsletter Vol 13, No. 2, http://newsletter.robic.ca/nouvelle.aspx?lg=EN&id=116

[16] Andre Simard, Vice President, Centre for Local Development, Charlevoix Region, personal communication, October 13, 2011

There are thousands of products throughout the world with Geographic Indication designation. From the Charlevoix experience, it appears to be a lengthy and costly process to attain and to maintain one of these designations, not necessarily well suited to Highway 16 corridor producers at this time.

3.4. Mentoring and Apprenticeship Programs

3.4.1. Step-Up Mentoring Program

The Step-Up Mentoring Program, through the Canadian Farm Business Management Council, provides a minimum of 8 weeks of on-farm learning placement that matches Mentees with experienced farm managers in order to learn critical aspects of farm management in a hands-on setting while acquiring real-life business skills. The program aims to provide a learning and sharing environment for both Mentor and Mentee, help transfer skills and narrow the knowledge gap while assisting established farmers to see their business from the viewpoint of a Mentee full of creative ideas and enthusiasm. Mentors can expect $2,000 in compensation for their participation while Mentees will receive a compensation wage for their work on the farm. More information is available at:
http://www.farmcentre.com/features/thenewfarmer/Resources/StepUp/

3.4.2. SOIL – Canada's Sustainable Farm Apprenticeship Program

SOIL links Canadian farmers willing to take on and train apprentices with people who want to work and learn on an organic farm using sustainable practices. SOIL aims to create apprenticeships which transfer lasting knowledge to both the farmer and the apprentice. Two Bulkley Valley farms currently offer apprenticing opportunities.
http://www.soilapprenticeships.org/home.html

3.4.3. NCAT Sustainable Agriculture Project

The Project lists thirty BC farms offering internships including three farms in the Williams Lake – Prince George corridor. Farmers can submit an internship by subscribing at:
https://attra.ncat.org/attra-pub/internships

3.4.4. FarmStart Ontario

FarmStart is a not-for-profit organization which works toward increasing the presence of young and new farmers operating their own farm enterprises. FarmStart is working to support a new generation of farmers by combining the facilitation of unique programs and resources, building partnerships and networks, promoting sustainable business models and coordinating and communicating new, innovative and local market research as well as developing farm facilities, resources and linkages important to new and young farmers.

FarmStart's New Farms Incubator Program offers access to land, equipment and infrastructure at reasonable rates, along with business planning support, technical training, mentorship and experience with ecological and emerging farming methods. The New Farms Incubator Program is based on the successful Intervale Farms Program near Burlington, Vermont. The McVean Incubator Farm is located in Brampton on land owned by the Toronto and Region Conservation Authority.

Participants accepted into the program are involved in a tiered system of support that begins with **Test Croppers and Start-Up Farms** followed by **Enterprise Farms** and **Mentor Farms**. The program features greater support to enterprises during the early stage of development and phased out support as enterprise matures. The graduated approach is designed to **encourage new, alternative, and innovative business ideas** that include a primary consideration for overall and long-term sustainability. The New Farmers Incubator Program will eventually host a mix of New Farms, Enterprise Farms and Mentor Farms.

As it evolves, FarmStart will work toward creating a cooperative farm environment that encourages sharing of knowledge and resources. By fostering a diversity of farmers, with collaborative approaches to business, the goal is to create a growing number of interdependent and mutually beneficial enterprises. The goal of the New Farmers Incubator Program is to foster the development of fully independent and sustainable agricultural enterprises that supply local markets: http://www.farmstart.ca/programs/new-farms-incubator-program/

4. Value Chain Analysis & Recommendations

Figure 9 Highway 16 Food System Map

LEGEND

Beef, Lamb & Goat Producers

Broilers/Roasters

Vegetable Producer

Egg Producer

Berry Producer/Harvester

Hay & Forage Producers

Honey, Beekeeping

Mushroom Harvester

Pork Producers

Local Ingredient Buyer

The strong consumer interest in local food has changed the market dynamics of the retail grocery and the food service industry. This map shows the geographic distribution of food producers and current local food purchasers across the Highway 16 corridor.

The full map is available at: http://g.co/maps/3mnbj

4.1.Value Chain Opportunity Analysis

The investigation carried out during the course of this project revealed two value chain opportunities worth over $100,000/yr and the opportunity for retaining, backgrounding, finishing and selling local beef within the region worth over $3 million/year. A smaller but still valuable value chain opportunity exists in the Robson Valley and can be replicated across the region thereby increasing local food sales and food system capacity across the Highway 16 corridor.

> Support RioTinto Alcan's local food procurement policy by assisting with the establishment of a supplier network.

A target of 10% of Rio Tinto's total beef purchases would amount to approximately $100,000/year, and support labour continuity for local meat processors. This opportunity is complicated by RioTinto's contractual relationship with their foodservice supplier.[17] A meeting between Rio Tinto, ESS Compass and larger beef producers and processors in the region is advised in the interest of developing a regional beef value chain in support of Rio Tinto's local procurement policy.

This policy is available at:
http://www.procurement.riotinto.com/documents/Rio_Tinto_Procurement_principles_EN.pdf

Local Food Plus in Ontario has experience to share in resolving the issues affecting local food procurement by institutional buyers: http://www.localfoodplus.ca/local-sustainable-consulting. They embarked on a partnership with Farm Folk/City Folk in Vancouver in July 2011 to bring their certification system for local sustainable produce and meat products to B.C.

> Finishing beef locally for the local market returns 73% more value to the region (an average of $2,100/animal) compared to shipping liveweight beef for finishing elsewhere.

A local finishing target of 10% of the regional beef production would retain over $3 million dollars in the region each year. This opportunity requires participation by the institutional and foodservice buyers as well as the processors and the producers. Carcass optimization and per serving pricing tools exist to ensure value from the producers through to the consumer.

[17] Kevin Dobbin, Manager, Regional Economic Development, RioTinto, personal communication, December 1 & 7, 2011

Build a local/sustainable catering menu in partnership with executive chefs, producers and processors.

This is an opportunity for restaurants and foodservice to react positively to changing customer demand and for producers and processors of varying volumes to expand their market and build commercial sales capacity. A transition target of 10% of current ingredient purchases to local ingredients is estimated to retain $150,000 across the Highway 16 corridor each year.

Develop a local bulk fruit and vegetable Buying Club in the Robson Valley through coordinated weekly fresh sheets from area growers throughout the growing season and extending into the fall and winter with storage vegetables.

A freight advantage of $4,000 should be realized based on recent annual volumes. Total retained value to the local growers would be over $15,000. Local coordinated bulk fruit and vegetable sales would have the additional advantage of regularity and would reduce the "element of surprise" in delivery timing.[18] The Robson Valley is the only area of the region where producers did not have sufficient or excess storage capacity. Coordinating growing season bulk sales should help alleviate this issue.

[18] Lelani Arris, Co-owner, Dunster General Store, personal communication, November 23, 2011

4.2.Purchaser Identification

The following table shows current local produce purchasers by region and volume. Of these, only the Jasper Park Lodge restaurants are not meat buyers as well (since they are in Alberta and unable to buy meat processed by BC provincially licensed plants). This table is not exhaustive and does not include restaurants and catering companies who buy varying quantities of local produce.

Table 4 Current Local Produce Purchasers by Volume

Region	Case Quantities	Pallet Quantities	Truckload Quantities
Smithers	Eddyline Bistro Café Trackside Cantina Two Sisters Catering		BV Wholesale
Vanderhoof - Burns Lake Corridor	Gwyn's Green Grocer New Leaf Health Food & Café Redfern's Coffee House	Vanderhoof Co-op	
Prince George	Cimo's Coast Inn of the North Prince George Civic Centre Sassafras White Goose Bistro		UNBC
Robson Valley	Beanery 2 Bistro Cariboo Grill Dunster General Store The Gathering Tree Jasper Park Lodge (5) Swiss Bakery Tekarra Restaurant		

4.3. Producer Identification

The following table shows surveyed current local food producers by region and volume. Names in Green are vegetable and berry growers while livestock producers are in Red. This table is not exhaustive and only includes producers selling case or pallet quantities.

Table 5 Surveyed Current Commercial Volume Producers

Region	Case Quantities	Pallet Quantities	Truckload Quantities
Smithers	Anspayaxw Berry Products Dunn Logging Ranch Gattiker Farm Hamblin Acres Healthy Hugs Organics High Slope Acres Nordown Farm Unity Gardens & Farm	Dallaine Ranch Happy Pig Organic Farm	Little Valley Farm
Vanderhoof - Burns Lake Corridor	Canyon Tree Farms Rocky Acres Six Mile Capstone Werstuik		Whispering Winds Ranch
Prince George	4 B's Honey A/D Ranch Ironhorse Ranch Macalister Station Market Garden New Caledonia Lamb Company P & R Farms Ryser Farms Sweder Berries U-Pic	Cariboo Growers Crazy M Ranch	Chilako Meats Double W Farm Northern Farm Products Robin Tutte Farm
Robson Valley	Balsam Ranch Conways Robson Valley Fresh Roger's Organics	Joy Way Farms Robson Valley Sheep Co. Twin Meadows Organics	

Tables 4 and 5 are intended to serve as a guideline for matching appropriate volume producers and purchasers.

4.4.Food System Development Recommendations

1. Rio Tinto local procurement policy provides an excellent opportunity to facilitate the development of a Beef Value Chain by convening Rio Tinto's economic development manager and food service contractor, local processors and producers with appropriate expertise, finishing capacity and volumes. Use available resources from the Beef Value Chain development program at Thompson Rivers University and the Value Chain Management Centre at the George Morris Centre. Eligible applicants may apply to the new federal Agricultural Innovation Program, managed in BC by the Investment Agriculture Foundation, under Stream A – Knowledge Creation and Transfer. This includes developing agricultural value chains for profit and not for profit organizations. For more information about the Agricultural Innovation Program, visit www.agr.gc.ca/AIP or call 1-877-246-4682.

2. Collaborate with the hospitality and catering industry members to build a local/sustainable menu that can be offered to clients. Work with producers, chefs and foodservice suppliers/distributors to ensure that issues are addressed and strategies are appropriate, clear and focused on delivering value throughout the chain to all the participants.

3. Capitalise on the lessons learned with a Rio Tinto Beef Value Chain and establish similar linkages with other regional purchasers in order to increase the number of animals finished and processed within the region, thereby capturing maximum economic value.

4. Coordinate communication of projected regional produce availability and prices early in the year in order to capture local bulk buying market(s). Issue a weekly "Fresh Sheet" during the season. Example in **Appendix E.**

5. Recommendations for Implementation

<table>
<tr><th colspan="2">1. Action: Assist Rio Tinto in establishing a supplier network</th></tr>
<tr><td colspan="2">Description: Rio Tinto has a local procurement policy for their 1,500 person construction camp. They also have a contractual relationship with ESS Compass as their foodservice provider. They would benefit from assistance in establishing a supplier network for beef.</td></tr>
<tr><td>Suggested Tasks:
Facilitate a meeting with Kevin Dobbin of Rio Tinto, ESS Compass, Gillian Watt of Thompson Rivers University, and regional beef producers and processors.</td><td>Already in place/progress
Thompson Rivers University Regional Beef Value Chain
Value Chain Management Centre www.vcmtools.ca</td></tr>
<tr><td colspan="2">Who: Thompson Rivers University, Rio Tinto, ESS Compass, Community Futures Fraser Fort George and larger beef produers</td></tr>
<tr><td colspan="2">Timing: 2012</td></tr>
</table>

<table>
<tr><th colspan="2">2. Action: Build a local/sustainable menu to offer catering clients</th></tr>
<tr><td colspan="2">Description: The Prince George Civic Centre chef would like to build a local/sustainable menu to offer to catering clients but does not have time to organise it. Chefs at other facilities would benefit from having this resource.</td></tr>
<tr><td>Suggested Tasks:
Facilitate a meeting between PGCC Executive Chef Jorge Soares, and larger meat and horticulture producers
Organise further meetings between producers and processors and other purchasers such as Sean Rankin at Coast Inn of the North and Bary Barnes at the Ramada's Coach's Corner</td><td>Already in place/progress
Beyond the Market: Growing the North project http://www.beyondthemarket.ca</td></tr>
<tr><td colspan="2">Who: Community Futures Fraser Fort George, Prince George Civic Centre</td></tr>
<tr><td colspan="2">When: Winter 2012</td></tr>
</table>

<table>
<tr><th colspan="2">3. Action: Leverage the experience of building a local/sustainable menu with other users</th></tr>
<tr><td colspan="2">Description: Enhance the production, processing and marketing capacity of the regional food system by facilitating further meetings with other purchasers</td></tr>
<tr><td>Suggested Tasks:
Facilitate a meeting between decision makers for catering the 2015 Canada Winter Games - Colleen Van Mook, Director of Community Services for the City of Prince George, Myles Tycholis, Events Manager of the Prince George Civic Centre and Stuart Ballantyne, CEO of the Canada Winter Games.
Facilitate a meeting between UNBC Executive Chef Dean Russell, Sustainability Coordinator Danielle Smyth and producers and processors</td><td>Already in place/progress
Beyond the Market: Growing the North project http://www.beyondthemarket.ca/</td></tr>
<tr><td colspan="2">Who: Community Futures Fraser Fort George, Canada Winter Games 2015, University of Northern B.C.</td></tr>
<tr><td colspan="2">Timing: 2012</td></tr>
</table>

<table>
<tr><th colspan="2">4. Action: Capture increased value to the region by finishing and processing beef calves locally</th></tr>
<tr><td colspan="2">Description: The returns from finishing and processing calves within the region support the local economy and regional infrastructure as well as returning greater value to the producer. Production capacity greatly exceeds historical regional market demand but market demand is increasing from institutional purchasers.</td></tr>
<tr><td>Suggested Tasks:</td><td>Already in place/progress
Provincially licensed red meat processing and cut and wrap facilities
Bulkley Valley forage and finishing resources</td></tr>
<tr><td colspan="2">Who: Beef producers</td></tr>
</table>

<table>
<tr><th colspan="2">5. Action: Enhance the viability of the meat processing sector</th></tr>
<tr><td colspan="2">Description: Value chains which optimise efficiency through the food distribution system support year round processing infrastructure, enhancing employment and processor viability</td></tr>
<tr><td>Suggested Tasks:</td><td>Already in place/progress
Provincially licensed red meat processing and cut and wrap facilities
Bulkley Valley forage and finishing resources</td></tr>
<tr><td colspan="2">Who: Beef producers, institutional and foodservice purchasers</td></tr>
</table>

<table>
<tr><th colspan="2">6. Action: Connect new and existing growers for mentorship/apprenticeship opportunities</th></tr>
<tr><td colspan="2">Description: Existing producers have knowledge and expertise but not necessarily the capacity to increase production to meet emerging market demand. New growers can benefit from apprenticeship or mentoring relationships.</td></tr>
<tr><td>Suggested Tasks:
• Hold winter producer workshops/seminars across the region providing post-harvest handling and market display skills
• Facilitate regional grower networks
• Organise a field tour at an innovative production/processing operation</td><td>Already in place/progress
• Beyond the Market upcoming Events
• www.beyondthemarket.ca/whats-in-season/upcoming-events/
• Canadian Farm Business Management's Step Up Mentoring program
• www.farmcentre.com
• SOIL – A Farm Apprenticeship directory service www.soilapprenticeships.org
• NCAT directory of farm internships https://attra.ncat.org/attra-pub/internships
•</td></tr>
<tr><td colspan="2">Who: Community Futures Fraser Fort George, CFMBC, SOIL, National Centre for Appropriate Technology (NCAT), Robson Valley Growers</td></tr>
<tr><td colspan="2">Timing: 2012</td></tr>
</table>

<table>
<tr><th colspan="2">7. Action: Provide current wholesale produce pricing information</th></tr>
<tr><td colspan="2">Description: Producers who want to make the transition from farm gate volumes to commercial sales need current pricing information to use as guidelines in setting their own prices.</td></tr>
<tr><td>Suggested Tasks:
• Provide linkage on the Beyond the Market website to existing pricelists
•</td><td>Already in place/progress
• BC Certified Organic Wholesale Price Reports (www.certifiedorganic.bc.ca/rcbtoa/services/prices.html)
• USDA Agricultural Market Service Terminal Market Wholesale Price Reports (see Appendix B)
•</td></tr>
<tr><td colspan="2">Who: Community Futures Fraser Fort George</td></tr>
<tr><td colspan="2">Timing: Winter 2012</td></tr>
</table>

8. Action: Educate producers about the changing needs/desires of the market and alternative farming methods	
Description: New food products and changes in agricultural practices are an ongoing opportunity. It is difficult for producers to keep pace with all of the information they need to make the best choices for their operations and markets.	
Suggested Tasks: • Provide linkage to agri-business information opportunities (courses, webinars) •	Already in place/progress • Canadian Farm Business Management webinar series (www.agriwebinar.com) • BC Certified Organic webinar series (www.certifiedorganic.bc.ca) • BC Agri-food Knowledge platform (www.kmwpp.ca) • Lower Mainland Horticultural Improvement Society Growers Short Course and Pacific Agriculture Show • http://www.agricultureshow.net/ •
Who: Community Futures Fraser Fort George	
Timing: Winter 2012	

APPENDIX A Interview Questions and List of Respondents

Beyond the Market: Growing the North
Survey for Hotels, Restaurants and Institutions

A. Beef and Lamb

Q1. Which of the various attributes of locally produced beef and lamb matter to you and your guests' eating experience? (Choose all that apply and rank them)
( ) Taste, juiciness and consistent tenderness
( ) Supporting local economy
( ) Environmental sustainability (reducing food miles, sustainable farm.)
( ) Health aspects (e.g., no antibiotics and growth implants)
( ) Dry aging 14 days (beef only)
( ) Others, please specify

Q2. If a local brand can offer all of the items you have chosen, what percentage premium are you willing to pay over premium quality commodity brands?

Q3. For Beef, based on the pricing matrix above, what volumes (unit: kg) of the various primal cuts would you order weekly through the seasons?
High Season: which months? ____
Low Season: which months? _______________________________________

Product	**High Season (kg, weekly)**	**Low Season (kg, weekly)**
Chuck/Brisket		
Prime Rib		
Short Rib		
Tenderloin		
Rounds (please specify)		
Custom Patties		
Custom Sausage(s)		
Lean Ground		

Q4. Are there any other cuts that you would be interested in? Keep in mind the processors are local, customer focused and able to cut to your specifications?

Q5. If a software program and the brand manager are available to assist in carcass optimization and identifying cost per serving, would you be interested in purchasing the beef on a carcass basis providing the value could be demonstrated? Yes No

Q6. Would you be interested in buying local lamb? Yes No

Q7. Would you be interested in ordering whole lamb custom cut to your specifications?
Yes No

Q8. If not, what is the reason?

Q9. What are the most important considerations for you in choosing the source of your beef and lamb?

Q10. What ordering/delivery system would be most effective in meeting your needs?
( ) Sales/service through existing distributor
Note*: Gordons Food Service and Centennial Meats will not carry BC beef from provincially licensed plants*
( ) Sales/service provided by the producer or a representative of the brand.

Q11. How do you place your orders now? Phone Email Fax
Other (please specify)

Q12. Would frozen products be acceptable? Yes No
Other (please specify)

Q13. What delivery interval would you require on frozen meat products?
Weekly Biweekly Other (please specify)

Q14. What is your preferred ordering day? M T W Th F

What is your preferred delivery day? M T W Th F Sa

Q15. Is freezer space a limiting factor for purchasing local meat products with a longer delivery interval? Yes No

B. Other local food items

Q1. Please quantify other locally grown foods that you would be interested in purchasing.

Berries ____
Fresh Herbs ____
Garlic ____
Potatoes ____
Carrots ____
Onions ____
Lettuce/Salad Greens ____________________________________

Honey ____
Poultry ____
Pork ____
Other (please specify) __________________________________

Q2. Providing the quality is consistent and at or above your currently purchased products, what premium would you be willing to pay above the commodity brands that you are now purchasing?

Q3. Based on the pricing matrix above, what volumes (unit: lb) of the various products would you order weekly through the seasons?
High Season: which months? ________________________
Low Season: which months? ________________________

Product	**High Season (lb, weekly)**	**Low Season (lb, weekly)**
Berries		
Fresh Herbs		
Garlic		
Potatoes		
Carrots		
Onions		
Lettuce/Salad Greens		
Honey		
Poultry		
Pork		

Part II- Demographics

1. Age Range:
2. Years in this field:
3. Position:

4. Would it be acceptable for a sales person to contact you in regards to purchasing local products in the future?

Yes No

Name:
Phone:
Company:

List of Respondents

INSTITUTIONAL/GROCERY	
Summit Camps	Smithers
RioTinto Alcan	Kitimat
PG Civic Centre	Prince George
UNBC	Prince George
RESTAURANT	
Trackside Cantina	Smithers
EddyLine Bistro Café	Smithers
Historic BC Café	Hazelton
Cimo Mediterranean Grill	Prince George
North 54	Prince George
Sassafras Savouries	Prince George
White Goose Bistro	Prince George
Village Inn	Vanderhoof
Reidstone Bar & Grill	Vanderhoof
New Leaf Health Food & Café	Burns Lake
Alpine Inn (Great Escape Restaurant)	Jasper
Jasper Park Lodge	Jasper
Tekarra Restaurant	Jasper
Evil Dave's Grill	Jasper
Beanery 2 Bistro	McBride
Giggling Grizzley Pub	McBride
Sun Valley Restaurant	McBride
Café Mt. Robson	Valemount
Cariboo Grill	Valemount
The Gathering Tree	Valemount
The Swiss Bakery	Valemount
CATERING	
Two Sisters Catering/Café	Smithers
Sassafras Savouries	Prince George
Temptations Grill & Catering	Prince George
Two Rivers Catering	Prince George
Beanery 2 Bistro	McBride
The Gathering Tree	Valemount
The Swiss Bakery	Valemount
EXPEDITORS/GROCERY	
Bulkley Valley Wholesale	Smithers
UTM Exploration Services	Smithers
CJL (Chris Joyce Lorne)	Smithers
Gwyn's Green Grocer	Burns Lake
Vanderhoof Coop	Vanderhoof
Dunster General Store	Robson Valley

Potential buyers not successfully contacted

RESTAURANT	
Hudson Bay Lodge	Smithers
Logpile Lodge	Smithers
INSTITUTIONAL	
Central Interior Catering	Prince George
RESTAURANT	
Redferns Coffee House	Burns Lake
Tekarra Restaurant	Jasper
Evil Dave's Grill	Jasper
Anthony's Restaurant @ Amethyst Lodge	Jasper
Silverwater Grill & Lounge @ Chateau Jasper	Jasper
EXPEDITORS/GROCERY	
Shoppers Wholesale	Prince George

List of Farmer, Rancher and Processor Respondents

Contact Person(s):	Operation Name:	City:
Pete Amyoony	Pete'sPlace	Dunster
Robert Bucher	P & R Farms	Prince George
Dallas Bullock & John Crowley	Robson Valley Fresh Ltd	Valemount
Doug & Lori Brook	Woodmere Cattle Company	Telkwa
Herb Bulman/Loretta Simpson		Valemount
Deb & Mac Cochrane	Balsam Ranch	Valemount
Adam & Joy Conway		McBride
Denise Doswell	Little Valley Farms	Vanderhoof
Dwain Funk	Country Locker	Vanderhoof
Anika Gattiker	The Gattiker Farm	Telkwa
Shirley & Lance Hamblin	Hamblin Acres	Houston
Alfred Horning	Rocky Acres	Burns lake
Joe & Simone Hug	Healthy Hugs Organics	Smithers
David Kellett	Northern Farm Products Ltd.	Prince George
Karen Kellett	Sweder Berries U-Pick	Prince George
Gary & Wendy Lowe	Twin Meadows Organics	McBride
Allan McCloud	Chilako Meats	Prince George
Mike Monroe	Monroe Creek Meats	McBride
Philip Myatovic	Cariboo Growers	Prince George
Mike Noullett	Kawano Farms	Prince George
Dennis or Vicki Richardson	NEWSAT FARMS	Vanderhoof
Martin Ruiter	Whispering Winds Ranch	Vanderhoof
John Ryser	Ryser Farms	Prince George
Max Schultz	Ironhorse Ranch	Prince George
Ron and Barb Seyforth	Rainbow Berry Farm	Prince George
Marlene Thimer	Happy Pig Organic Farm	Telkwa
Dan and Darlene Werstuik		Burns Lake
Marilyn Wheeler	Nordown Farm	McBride
Warren and Lynne Wilson	Double W Farm	Prince George
Bryan Worrall	Sunrider Ranch	Francois Lake

List of potential operators not successfully contacted

Contact Person(s):	Operation Name:	City:
Wayne Volk	NW Premim Meat Co-op	Telkwa

APPENDIX B   Statistics Canada Data Tables

Table 1 Gross Farm Receipts

	Statistics Canada 2006 Census of Agriculture					
	Fraser Ft. George		Bulkley Nechako		Kitimat Stikine	
Gross Farm Receipts	2006	2001	2006	2001	2006	2001
< $10,000/yr	305	336	360	444	76	99
$10,000 - $24,999	150	148	176	183	31	25
$25,000 - $49,999	65	74	133	118	13	17
$50,000 - $99,999	50	31	102	83	11	5
$100,000 - $249,999	34	21	66	82	1	6
$250,000 - $499,999	10	12	39	22	2	0
$500,000 - $999,999	3	3	6	9	0	0
$1,000,000 - 1,999,999	3	3	1	2	0	0
$2 million +	1	1	3	2	0	0
Total Farms Reporting	621	629	886	945	134	152

Table 2 Livestock Production

	Statistics Canada 2006 Census of Agriculture					
	Fraser Ft. George		Bulkley Nechako		Kitimat Stikine	
	Farms	Animals	Farms	Animals	Farms	Animals
Beef Cows	281	12,051	499	31,805	44	x
Dairy Cows	9	214	29	1,050	1	x
Pigs	45	375	60	347	10	147
Sheep & Lambs	54	2,382	63	3,328	16	406
Goats	35	324	48	508	13	157
Bison	9	512	3	129	0	0
Meat Chickens	37	x	59	3,357	19	1,108
Laying Hens	104	46,122	156	3,998	45	1,593
Turkeys	23	518	37	936	12	216
Bees	12	242	14	97	6	19

Table 3 Vegetable and Berry Production

	Statistics Canada 2006 Census of Agriculture					
	Fraser Ft. George		Bulkley Nechako		Kitimat Stikine	
	Farms	Acreage	Farms	Acreage	Farms	Acreage
Carrots	15	20	9	2	10	3
Rutabagas	5	3	4	1	1	x
Cabbage	9	13	4	1	8	9
Potatoes	20	39	22	33	16	82
Beets	11	6	5	1	6	2
Tomatoes	6	1	4	1	8	2
Cucumbers	5	2	5	x	9	2
Onions	5	1	6	1	4	1
Lettuce	9	6	4	1	10	2
Spinach	6	1	3	1	2	x
Peppers	3	x	1	x	1	x
Strawberries	7	4	3	2	8	3
Raspberries	14	6	9	6	9	2
Saskatoons	5	6	1	x	0	0

APPENDIX C BC Beef Food Service Primals

This table shows the breakdown of the various food service cuts and market value based on hanging carcass weight. It shows the value of an animal finished and sold within the region. In comparison, calves that are sold live-weight outside of the region return 27% of the potential market value that they would receive if they were finished and processed within the region. This corresponds to a revenue multiplier of 2.7.

The table shows a cutting choice in either blue or green with a difference in weight and value, depending on market preference.

ASSUMPTIONS			
Carcass Weight (kg)	380		
Lean Meat Yield exc fat, bone, offal	63%		
		Food Service	
	Kg per Animal	**Est. Price/kg**	**Value**
Patties (4, 5, 6 or 8 oz.)		$8.20	
Specialty Cut Lean Ground		10.00	
Trim 85% Lean	35	6.20	$217.00
Trim 80%		5.78	0.00
Trim 50-50	8	1.54	12.32
Brisket	9	10.29	92.61
Cross Rib Roast	11	11.55	127.05
Chuck Roast	16	10.50	168.00
Flat Iron	2.5	15.88	39.70
Chuck Flats	1.8	13.55	24.39
107 Rib	18	23.25	418.50
Short Ribs	12	11.88	142.56
Strip Loin	10	29.65	296.50
Tenderloin	5.25	35.70	187.43
Top Sirloin Butt	10.5	14.70	154.35
Tri Tips	1	12.60	12.60
Flank Steak	1.75	14.86	26.01
Skirt Steak	1.75	16.80	29.40
Eye of Round (new cut)	4.75	13.65	64.84
Beef Bottom Flat (new cut)	12	8.40	100.80
Inside Top Round	18.3	9.45	172.94
Sirloin Tip	11.7	10.50	122.85
OR Bone in Hips	88	7.90	695.20
Hanging Tenders	8.57	12.65	108.41
Bone in Shank Steaks	10	7.35	73.50
Necks, Bone in	15	8.40	126.00

Pancetta	3.5	8.40	29.40
Bones	12	3.15	37.80
Offal Pack (heart)	4	4.30	17.20
Offal Pack (liver sliced)	7.3	4.30	31.39
Offal Pack (kidney)	1	4.25	4.25
Oxtail	2.19	9.45	20.70
Cheek Meat	1.51	9.50	14.35
Tongue	2.14	4.75	10.17
Total	258		$2,883

APPENDIX D Income Projection for Marketing and Distributing Finished Beef Hwy 16 Corridor

	January	February	March	April	May	June	July	August	Sept	Oct	Nov	Dec	Total
Capitol Costs													
Web Site	$2,500												
Reefer Camper or Trailer	11,000												
Total Capitol Costs	**$13,500**												
Assumptions													
# Direct Sale Beef (1/4's and 1/8's incl Farmer's Mkt)	6	7	7	7	7	7	7	8	8	8	9	9	**81**
# Food Service Beef (includes hotels, camps, instit)	5	5	5	5	6	6	6	6	6	6	6	6	**62**
# Carcass Beef (butcher shops, stores etc.)	8	9	9	9	10	10	11	11	10	10	10	8	**107**
Total # Beef	**19**	**21**	**21**	**21**	**23**	**23**	**24**	**25**	**24**	**24**	**25**	**23**	**250**
Gross Margin/DS Beef	$465	$500	$500	$500	$500	$500	$500	$500	$500	$500	$500	$500	
Gross Margin/Food Service Beef	500	500	500	500	500	500	500	500	500	500	500	500	
Gross Margin/Carcass Beef	100	100	100	100	100	100	100	100	100	100	100	100	
Travel													
Kilometers/Month	2,000	2,000	2,000	2,000	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	
Rate $/km	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	
Gross Margin- Revenue													
Direct Sale	$2,790	$3,500	$3,500	$3,500	$3,500	$3,500	$3,500	$4,000	$4,000	$4,000	$4,500	$4,500	**$44,790**
Retail Store Beef	2,500	2,500	2,500	2,500	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	**34,000**
Carcass Beef	800	900	900	900	1,000	1,000	1,100	1,100	1,000	1,000	1,000	800	**11,500**
Total Revenue	**$6,090**	**$6,900**	**$6,900**	**$6,900**	**$7,500**	**$7,500**	**$7,600**	**$8,100**	**$8,000**	**$8,000**	**$8,500**	**$8,300**	**$90,290**
Sales and Admin Expenses													
Freezer Costs all in	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	$1,200	**$14,400**
Distribution Costs	1,500	1,500	1,500	1,500	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875	**21,000**
Half Time Sales Person Salary $30K +17%	2,925	3,900	3,900	3,900	3,900	3,900	3,900	3,900	3,900	3,900	3,900	3,900	**45,825**
Bokkeeping/Accting $25/hr X 10 hrs/mo	250	250	250	250	250	250	250	250	250	250	250	250	**3,000**
Total Costs	**$5,875**	**$6,850**	**$6,850**	**$6,850**	**$7,225**	**$7,225**	**$7,225**	**$7,225**	**$7,225**	**$7,225**	**$7,225**	**$7,225**	**$84,225**
Net Income	**$215**	**$50**	**$50**	**$50**	**$275**	**$275**	**$375**	**$875**	**$775**	**$775**	**$1,275**	**$1,075**	**$6,065**

APPENDIX E Pricing Databases & Sample Fresh Sheet

B.C. Certified Organic Fruit & Vegetable Pricing

These prices are what Vancouver wholesalers charge retailers outside Vancouver for product delivered to the store door. Pricing includes freight paid to commercial carriers for delivery. They are not the prices that farmers should expect to receive if selling to wholesalers and are provided simply so farmers have some market guidance when selling to stores, restaurants or at farmers' markets.

Prices updated monthly: http://www.certifiedorganic.bc.ca/rcbtoa/services/prices.html

USDA Agricultural Marketing Service Wholesale Price Reports

A choice of daily reports exists across the USA for Terminal Produce Markets across a range of products (fruit, vegetables, onions and potatoes, herbs, Asian vegetables and nuts). These are the prices paid by wholesalers or distributors in the USA. The Seattle Terminal Market prices are what Vancouver distributors or wholesalers pay plus brokerage and transportation. They are not the prices that farmers should expect to receive if selling to wholesalers and are provided simply so farmers have some market guidance when selling to stores, restaurants or at farmers' markets.

Prices updated 2-3 times weekly:

http://www.ams.usda.gov/AMSv1.0/ams.fetchTemplateData.do?template=TemplateO&navID=ViewU.S.TerminalMarketPriceReports&rightNav1=ViewU.S.TerminalMarketPriceReports&topNav&leftNav&page=FVMarketNewsTerminalMarketReportsMore

APPENDIX F Sample Fresh Sheet

GREEN ROOM ORGANICS

FRESH SHEET

AUGUST 12 TO AUGUST 26, 2011

Currently available:

BEANS .... **$3.00 / half lb**

CABBAGE ....**$2 - $3 / each**

CARROTS .... **$2.50 / bunch**

CUCUMBERS (long english) .... **$2.00 each**

CUCUMBERS (pickling) .... **$2.50 / lb**

LETTUCE .... **$2.00 / each**

ONIONS (sweet white) .... **$2.50 / bunch**

POTATOES (Russet / Yukon Gold) .... **$2.50 / lb**

RASPBERRIES (frozen only) .... **$5.00 / half lb**

SWISS CHARD .... **$3.00 / bunch**

TOMATOES (cherry) .... **$3.50 / half pint**

TOMATOES (bulk assorted) ....**$3.75 / lb**

ZUCCHINI (assorted varieties) .... **$1.00 / each**

HERBS:

BASIL .... **$3.00 / 50g bag**

Source: www.greenroomorganics.ca