

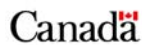
# Local Agri-Food: Supply and Demand - Narrowing the Gap “Snapshot Project”

Prepared by



Cowichan Green Community

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And the  
Cowichan Valley Regional District

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## Executive Summary

The *Local Agri-Food: Supply and Demand - Narrowing the Gap* project was developed to enhance market development of food grown in the Cowichan Valley. It was through previous food security stakeholder meetings that Cowichan Green Community heard from those involved in food production and purchasing that the gaps and barriers between food producers/processors and their key point-source markets had not been documented and shared amongst the groups in the Cowichan Valley. These missing points of information were viewed as an integral step in understanding what needs to happen next to enhance market development of locally grown food.

To achieve this goal, food producers and their key point-source markets were interviewed (restaurants, grocers, institutions with cafeterias, and the general public) to discover the gaps, and barriers that prevent them from selling/utilizing more locally grown food, as well as to identify opportunities to increase the market for local products. CGC staff conducted a literature review and created a list of survey questions with consultation from the local agrologist for each sector to prepare for the project. Eight sectors were identified for the survey: Farmers, Restaurants, Institutions with Cafeterias, Grocers, Processors/Producers, Local Government, Economic Development Agencies and the General Public. Participants were identified through an existing network of food security stakeholders, word-of-mouth, and cold-calling.

From these eight sectors a total of 76 interviews were conducted. The majority of stakeholders viewed local food as Cowichan Valley or Vancouver Island products. The results from all sectors showed that a high degree of loyalty exists to support local Farmers and the purchase of locally grown food.

The main gaps and barriers identified include:

- Higher prices – the key point-source markets find the cost of purchasing local is often not feasible within their budgets; however Processors/Producers are adamant they need to have control over pricing and receive fair market value for their goods;
- Financial constraints – was identified by Farmers and Processors/Producers as a significant barrier to expansion;
- Lack of production – was mentioned by Grocers as the main barrier to selling more local products, they need more producers in the area;
- Lack of skilled labour – is important to Farmers who require trained seasonal help;
- Unavailability – point-source markets require items to be available in sufficient quantity, quality, duration to meet the demand;
- Education – Farmers require opportunities for educating newcomers to the industry, and a public that is educated about the true cost of cheap food;
- Growth pressure – the conflict between urban development and agricultural lands was identified by Local Government;
- Inconvenience – the inability to easily source local ingredients is a barrier determined by the Restaurant sector; and
- Lack of communication – between sectors there are few opportunities to meet and discuss, network and partner around issues of food security and sustainability in the Valley

After the interviews were conducted, a stakeholder meeting was held to provide an opportunity for discussion, networking and partnering based on an interim summary of the survey results. Ideas that surfaced during interviews and discussions at the stakeholder meeting include:

- Be proactive in protecting farmland and the farming lifestyle;

- Be creative to ensure profitability i.e. explore value-added products as a means to create an identity for your product and create demand;
- Educate consumers about the importance of local agriculture and the true cost of cheap, imported food;
- Create educational opportunities for young and experienced farmers;
- Encourage grocery stores to create a locally grown 'island' section, much like the organic section; and
- Create policies that support buying local first.

## **Project Rationale**

It is well known that the state of agriculture in British Columbia, including that of Vancouver Island, is dwindling. Fifty years ago the Island produced approximately 90 percent of its own food, yet that figure has steadily declined. In 2006 Dr. Perry Kendall, Provincial Health Officer, cited "...research showing that only half the available farmland on Vancouver Island is in production, and 90 percent of the Island's food is brought in," while the rest of it travels an average of 1700 miles to our tables. (*Newsleader Daily*, Oct. 6, 2006). Recent research continues to show a similar pattern, and NDP agriculture critic Corky Evans was quoted in a May 23, 2008 media release for *Food for BC* as saying, "Today, only five percent of the food consumed on the Island is produced here... (T)his is not a question of land. We have huge amounts of unused farmland. This is a question of the profitability of farming and the broken food distribution system." This trend must be reversed and we must make small scale farming viable once again.

In addition to the shrinking amount of land in the Agricultural Land Reserve (ALR), lack of upcoming farmers, 54.6 as the average age of farmers on Vancouver Island (53.6 for BC and 52 nationally), the under-utilization of existing land, and soil composition/quality, North Cowichan's *Strategic Agricultural Plan* (2001) outlined other weaknesses in agriculture in the area:

- Lack of community awareness of agriculture;
- Lack of infrastructure;
- Lack of access to water;
- High input costs;
- Production of low value commodities;
- Marketing; and
- Regulation.

In February 2006, Cowichan Green Community (CGC) held two community-based meetings on Cowichan's food security. At these two events, 69 participants, including farmers, small-scale food processors, service providers, and private citizens met to build capacity around creating a community food action plan. From these two meetings it was revealed that there are a number of gaps and barriers between farmers and potential local markets. It was felt that a clearer understanding of these gaps and barriers between farmers and key point-source markets (i.e. grocer chains, institutions, restaurants) would help increase the consumption/use of local foods.

In March 2008, CGC and partners released the Cowichan Food Security Plan (The Plan). This document is the result of months of community outreach, stakeholder focus groups, and community meetings to identify actionable goals to increase food security for the Cowichan Valley. Food security exists when all members of a community have access to sufficient food that is nutritious, safe, environmentally sustainable, personally and culturally appropriate, and maintains the viability of farming, in order to live an active, healthy life.

The Plan identified a number of actionable items to increase food security in the Cowichan Valley. It was very apparent through the process that the viability of local farming is paramount to food security as well as community economic development. Actions cited in regards to local farmers and food producers include:

- A marketing program/Island product differentiation;
- Hiring a Cowichan Valley Regional District agriculture coordinator;
- Addressing labour and water shortages; and
- Create a cold storage facility.

It was through the partnerships created during these community processes that we were able to connect with many of the participants for the Islands Agri-Food Initiative survey which allowed us to outline in more detail the barriers and gaps food producers and their key-point markets face.

## **Purpose**

The purpose of this project is to enhance local market development of food grown in the Cowichan Valley. To achieve this goal we formally interviewed food producers and their key point-source markets (Grocers, Restaurants, General Public, Institutions with Cafeterias, etc.) about the gaps and barriers that exist preventing them from selling/utilizing more local food. After the results were gathered, stakeholders were invited to share information, connect with each other, and network, strengthening links to identify new ways to address their issues. This provided the platform needed to bring together ideas that otherwise may not have been discussed.

By focusing on the key point-source markets as identified in the project, we felt that we could begin to address the fundamental issue of marketing strategies for island products. Addressing the issues in this manner will impact the general public through improved educational materials and advertising campaigns, which we hope will encourage them to purchase more local foods, therefore maximizing the positive impact on the local food economy.

## **Process**

Cowichan Green Community staff, in consultation with local agrologist Wayne Haddow, developed a set of 30 survey questions. These questions were designed to identify each sectors' barriers to supplying or utilizing local foods for the project slated to begin in February, 2007. For various reasons the project was delayed and by the time it began in earnest, a couple of pertinent reports had been published – *Contending with the Local Food Access Puzzle* published in August 2007, and *Increasing Food Security in the Ladysmith Area*, March 2007. As well, the Cowichan Food Action Plan was being developed, and early results from that process were becoming available. Based on the findings of these studies, and with a particular sensitivity to the perspective that a “fatigue with research [is] in evidence amongst farmers” (Edible Strategies, 2007, p. 22)<sup>1</sup>, the survey was reworked to include questions that would be likely to offer something to farmers rather than expecting them to educate others, as has so often been the case. As well, some of the former questions were now redundant in view of the more recent findings. In total 45 questions were developed for the revised survey in consultation with the principal researcher of the former study, and a member of the Islands Agri-Food Initiative.

More than 50 interviews were conducted, either in person or over the phone. A few individuals requested to participate via email, and were notified that they may be asked to follow up if answers were incomplete.

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<sup>1</sup> Edible Strategies. (2007). *Contending with the Local Food Access Puzzle*, [http://www.ediblestrategies.com/fsd/FinalReport\\_BCMSF.pdf](http://www.ediblestrategies.com/fsd/FinalReport_BCMSF.pdf)

The total number of interviews consisted of:

- 15 Farmers;
- 10 Restaurants;
- 9 Institutions with cafeterias;
- 8 Grocery stores;
- 5 Food processors/producers;
- 4 Local government representatives;
- 2 Community economic development agencies; and
- 23 Members of the general public.

A considerable amount of time was spent tracking down participants who were willing and able to participate in the survey within the given time-frame, and to the best of our abilities we gathered a wide representation of participants from each stakeholder group. Some participants aided in the process by identifying other stakeholders who they felt would be an asset to the project. Interviews ranged from Lake Cowichan to Duncan to Crofton to Shawnigan Lake, successfully spanning the Cowichan Valley region.

**Results**  
**Farmers**

In total we interviewed fifteen local farmers whose operations ranged from small and specialized to supply managed products. Farms from the south end of the Valley to Duncan and Glenora participated. Each farm had its own difficulties, but all voiced similar concerns in regards to barriers and gaps.

- The Cowichan Valley is rich in a diverse selection of farm products. The table below illustrates the number of agricultural items sold by participating farms.
- 13 of the 15 farmers interviewed have very little problem selling their products. Local farmers reach their markets in a variety of ways, including restaurants, fruit stands, farmers' markets, and direct sales. This table illustrates the findings of the survey:

# Farms	MARKET
6	Grocery Stores (including Country Grocer, Old Farm Market, 49th Parallel)
6	Direct Sales
5	Duncan Farmers' Markets
4	Restaurants
4	Farm/fruit stands
3	Other Markets (Red Barn and pocket markets in Victoria, Chemainus Market)
2	Community Supported Agriculture
2	Their own store
2	Phone/internet orders
1	Box program

One of the two farms that cited some difficulties selling their products reported that during the height of the growing season, when people are growing their own food, it can be difficult to sell out. The other farm reported that it was their first year in operation and in order to maximize their profitability, they planned on diversifying the farm.

# Farms	ITEM	# Farms	ITEM
13	Mixed produce (potatoes, carrots, cucumbers, tomatoes, etc.)	3	Lamb
7	Eggs	3	Berries
6	Value added products (soup, flowers, essential oils, soap, juice, etc)	2	Teas
5	Chicken	1	Veal
5	Herbs	1	Cheese
4	Beef	1	Spices
4	Pork	1	Coffee
		1	Chocolate
		1	Honey

Although most farmers do not have much difficulty selling product, there are still barriers to expanding and therefore fully realizing their farm's potential. Five participants responded that they had no issues at all in selling their product; however there were a number of issues identified:

- Five farmers cited lack of control over prices of their own products as a barrier. In order to offset this, some sell direct, but profitability is a large issue and for individuals to want to enter/continue in the profession, farming needs to become financially viable.

- One of the farmers is affected by the Vancouver Island Produce Agency and has no control over prices, so that they are forced to compete with cheap imports, making it difficult to get a fair price for the product.
- Four cited needing 'more support' ranging from: support for farm infrastructure in moving product field to table, and more support at the grocery store level through further understanding of the farm-income crisis and an ability to aid local managers in influencing senior managers to purchase more local products.
- Challenging financing options that inhibit increased production and do not allow farmers to buy good arable land is also seen as a barrier.
- Three reported that promotion of the farmers' markets needs to be increased and marketed more as a community event. It is important to re-create the relationship between farmer and consumer. In addition to engaging consumers in the whole process, a mid-week market was identified by two farmers as a possible solution.
- Lower than desired production was cited as a barrier, and two participants reported having more viable land would benefit, and another two cited labour issues as being a consequential barrier.
- One farmer mentioned regulations around farming, and specifically when federal inspection regulations were implemented. Many farmers expended a significant amount of money to ensure their products would meet the new standards. Other farmers realized they would not be able to afford the new standards and chose to shut down, and some did not make any changes to their processing and are still in operation. It is perceived this has created an inequitable playing field.
- Lack of education and support to new farmers was also identified as an obstacle. Learning how to market the products is challenging, and there is a need for more information sharing and training in that area.

The overall difficulty in selling more products for local farmers is the resources to do so. Demand for local food can easily trump supply with the current number of growers. Most farmers interviewed reported little trouble selling their product, and identified barriers to increased production including financial constraints and the lack of skilled labour. They also need more supports including more control over pricing of their goods, more educational opportunities, and a general public who understand the true cost of cheap food.

## Restaurants

A cross-section of ten restaurants in the Cowichan Valley participated in the study. Two of the restaurants are chain or franchise outlets, nine are local; eight are privately-owned enterprises, and one is owned by shareholders.

- Only one of the restaurants canvassed belongs to the Island Chefs' Collaborative, and is also a member of the Cowichan Valley Chef's Association.

Comment [MSOffice1]:

- 60% of respondents defined local as food or ingredients produced in the Cowichan Valley, the rest said they consider Vancouver Island local.
  - Six restaurants confirmed they would look to the Cowichan Valley first.
    - If the product is not available in the Valley, one said they would go to the “next closest place possible,” while two others would look anywhere on the Island.
    - Two would expand the range beyond the Island to include all of BC.
  - Vancouver Island is the first definition of local four of the restaurants chose.
    - One restaurant would add a second tier to their definition of local and look beyond the Island to encompass BC.
  
- Regarding the demand for local food from customers, 50% said ‘yes’ people are asking.
  - Five said there is a demand for local and/or organic ingredients, one of which said ‘absolutely.’
  - Three restaurants reported there is no demand.
    - One said it’s not a common question.
    - Another said “it has never been brought up.”
  - One respondent reported a decrease in demand.
  - Another said not so much, people don’t appreciate the effort and extra costs of local food; they try to use wild foods.
  
- Restaurateurs reported that patrons’ willingness to pay more for local food was mixed.
  - Six respondents replied yes, to some degree people are willing to pay for local food:
    - One reported that people are absolutely willing to pay more.
    - Two said it depends on the person.
    - One is convinced younger people will pay more and care more.
    - One said slightly.
    - Another answered not very much.
  - Three of the restaurants said no, people are not willing to pay more for local.
  - One said “I don’t really think so.”
  
- 100% of the restaurants we spoke to use as many local ingredients as possible.
  - The percentage of local ingredients used ranges from 5% to 90% depending on the season.
  - The type of ingredients some of the restaurants mentioned using are:

# Restaurants	Ingredient
5	produce
3	seafood
2	fish
2	wine and beer
2	eggs
2	herbs

- One respondent noted that the flavor of local ingredients is better.
  
- Over half the restaurants surveyed are able to buy short duration, smaller volume, and specialty items.
  - Six restaurants purchase short duration and small amounts:
    - Two purchase based on their needs
    - Two said they take what they can get
    - One shops competitively price-wise

- One said it's difficult if they're shorted
  - Three accommodate fresh local ingredients through the use of daily specials or changing menus.
  - Three of the restaurants say freshness is key.
  - One replied - 2 weeks, \$200.
  - One restaurant needs 100 lbs. of vegetables per day 12 months of the year, some of which are not seasonally available here.
  - One franchise's menus and suppliers are determined by SYSCO.
- Barriers/gaps that prevent restaurants from utilizing more local ingredients:
    - Four mentioned availability - can't grow certain items locally (i.e., pineapple), and some ingredients are seasonally unavailable.
    - Four confirmed price is important - lack of people buying local means the cost is higher.
    - Four restaurants want convenience - local can be hard to source, and they need a website to connect local producers with restaurants, and a good marketing system.
    - Three respondents said lack of delivery is an issue.
    - Two need consistency and reliability.
    - One said corporate regulation allows them no opportunity to deviate from the menu or suppliers that are pre-determined.
    - One restaurant reported that government regulations on items such as meat and dairy have caused them difficulty as farmers have had to meet specifications.
    - One restaurant said there are no barriers – they can buy as much local as they need right now.

A prominent theme threading through the restaurant sector attests to the commitment chefs have to use local ingredients and products in their creations. Daily specials and changing menus help accommodate the seasonal, short duration, smaller volume and specialty items when they are available. Price (the cost of local is higher for a variety of reasons), availability (the inability to grow certain items and seasonal unavailability of others), and convenience (difficulty in sourcing local) were the top barriers mentioned by those included in this sector. That being said, freshness and flavor are key.

### **Institutions with Cafeterias**

We interviewed a total of nine institutions with cafeterias within the Cowichan Valley. This was a very diverse group as we surveyed a hospital cafeteria, five schools that have cafeterias for their students, one non-profit organization, one local soup kitchen, and a local cafeteria within the aboriginal community. Each cafeteria had their own unique limitations as their clientele differed significantly.

- Their definition of local food was fairly consistent.
  - Every participant in this sector identified food from the Cowichan Valley as local first.
  - Three expanded that area out into the rest of Vancouver Island.
  - Two then included the Lower Mainland.
  - Two continued to include all of BC.
- The usage of local food in their menus varied significantly.
  - Eight institutions use local food when they can.
  - Two institutions use up to 75% local in their menus, within their definitions of local – being anywhere within BC.
  - One school does not use any local food that they are aware of as all their food is supplied from a main supplier off island.
  - One school uses very minimal local food.

- One of the local soup kitchens offers as much local food as they can in their meals.
- One finds it hard to find suppliers who can meet their volume requirements.
- Demand for local food from this sector also varies.
  - Five of those surveyed indicated, there is a growing demand for local food.
  - One specified a demand especially for local organic.
  - Only one respondent stated that there was not a growing demand.
  - One felt the students wanted more, but they were unable to provide due to their barriers which included additional costs.
  - Local, traditional foods are also in demand, reported one source.
- The overall knowledge of food security was also at different levels.
  - Five reported a general awareness of food security and its importance to sustainability and local agriculture.
    - Within those five, four of them were personally interested and motivated.
    - Two indicated they had no knowledge of the issues.
    - One was somewhat informed.
    - One did not indicate their knowledge.
- Barriers to utilizing more local food are diverse and include:
  - The cost of food as the number one barrier; it needs to fit within limited budgets;
  - The need to meet regulations;
  - Food must be properly inspected and graded;
  - Cafeterias must adhere to a fair business practice;
  - Food budgets are not based on the cost of local food but instead contracts are put up for 'bidding;' and
  - Local food may not suit client's tastes (i.e. teens are picky eaters).

The overall theme of the institutions that offer a cafeteria-style food service is that although most are aware of the local food issues, the additional cost is the number one barrier. Their restrictions, due to regulations and requirements, are such that offering more local food choices to their clients presents additional obstacles. Working within the confines of strict budgets, means that it is unlikely that more local food will be offered until the prices can become more competitive.

## **Grocers**

We interviewed a total of eight grocers from a wide cross section within the Cowichan Valley. We received information from three larger chain stores, one grocery store owned by an American Corporation, and four independent, privately-run operations.

- When determining the boundaries for what constitutes local food, it seems to be a tiered process.
  - Two of the grocers defined local food as coming from the Cowichan Valley specifically.
  - Then the spectrum broadens as five grocers defined local as anything grown on the island.
  - One considered anything from BC.
  - Since some products are not available here on the island, one of the larger chains considered that the most locally-available can also include products coming from Alberta.
- During the high growing season, most of the stores surveyed offer as much local produce as they can acquire.

- Two of the smaller independently owned grocery stores offer between 70 to 80% local produce during high season.
  - One large store indicated they will pay more and charge more for local products when available as long as the quality was there.
  - Another large store purchases through the Vancouver Island Produce Association and quantity varies seasonally.
  - One large store indicated that although they sell approximately 15% local, they are more regulated by their corporate office, placing restrictions on how flexible they can be in accepting products from individual growers.
- All of our local grocery stores, regardless of size are very supportive of farmers.
    - Two of the larger chains are still very flexible and will accept smaller amounts of produce from local growers, even on an inconsistent basis.
    - All the four smaller stores were flexible enough to deal with single suppliers.
  - The demand for local produce from the customers overall seems to be increasing.
    - Seven grocery stores indicated the demand from local customers is increasing.
    - One indicated that they cannot keep up with that demand.
    - One grocery store said they were not experiencing direct requests from their customers, but they expect this to increase due to the recent media attention.
  - There is an identifiable disconnect between the farmers and the grocery outlets concerning what is grown locally and is available for sale, and how to market products to the stores.
    - One large grocery store indicated that there is a portion of growers who don't know how to get their products into the grocery outlets.
    - One of the grocers admitted their lack of knowledge on what local farmers are growing and what is available for purchase.
    - One large grocery store has actually hired a broker to try to bridge that gap.
  - The main barriers identified are:
    - Lack of quantity on a consistent basis to meet the demands of consumers;
    - Lack of food processing on the island;
    - Lack of growers and diversity of products being offered;
    - Cost;
    - Freight and distribution challenges; and
    - Smaller producers cannot meet the demands.
  - There is definitely an increase in demand for local products from consumers and the grocers would sell more, if available. Educating the consumer is important – the “I want to have access to all types of food all year round” is still a very strong requirement for shoppers.

The overall theme in this sector is that the Cowichan Valley grocery stores are aware of the issues and the increasing demands from consumers to offer more local products. The smaller, independent stores obviously have more autonomy and are able to work within the limitations of the smaller producers. The trend is growing within the larger chains to offer more local when available. Most realize the need for some flexibility. The indications are that the trend to offer local food will keep increasing in order to keep up with the demand. The largest barrier is the lack of current producers in the area. Local production has to increase and then stores will facilitate selling more products to consumers.

## Processors/Producers

Five enterprises based in Cowichan participated for this sector – all are local and privately-owned. The products ranged from ice cream and cheese to chicken, turkey, pork, veal and lamb to specialty sauces.

- More than half of those surveyed indicated anything on Vancouver Island is considered local.
  - Three reported local is Vancouver Island
  - Two said Cowichan Valley and one of those detailed a tiered approach, which includes BC, Pacific North, Western Seaboard, Canada, and the World.
- All of those surveyed say the majority of their product is local.
  - The three who answered with a percentage say 100%, 90% and 60-75% of their product is local.
  - One gets chicken and duck from the mainland, and offers value-added products that aren't local, while all other meat products are produced locally – turkey, pork, veal, lamb, etc.
  - The other respondent says they source rennet and bacteria overseas because they can't get it locally, but buy all their milk on the island.
- 100% of processors/producers focus on sourcing as many ingredients as possible locally.
  - Four say they only import items they cannot get here in the valley – for example chocolate and certain spices. One respondent is hoping to get ingredients currently unavailable specially grown here.
  - One sources chicken from Nanoose to Gabriola to Saanich and uses no imports at all.
- The majority have heard of the Small Scale Food Processor Association.
  - Four out of five are aware the association exists, and of those one said “to some extent.”
  - Another replied they've heard of them but never looked into it.
- A wide variety of gaps, barriers and needs were identified, including:
  - Financing – the cost of financial aid and calculation methods is onerous and detrimental to producers/farmers who need access to funding for expansion and additional machinery
  - Too much government intervention and no cohesion among governing bodies
  - More knowledge of producers in the local community, people should be aware of what's produced in the valley
  - A need for more customers
  - Locals are competing in markets that are heavily subsidized, and have more constraints than people exporting food to Canada, it's not a level playing field
  - Branding recognition – one respondent suggests promoting the Rooster Booster on highway billboards
  - The issue of a split farmer's market, which creates awkwardness for the consumer
  - Difficulty finding trained people who will stay on in certain positions

A theme common to all processors/producers sampled in the study is they agree hands down, that local (Vancouver Island, Cowichan Valley) ingredients are preferable and sought after by consumers in the Valley. The foremost barrier is financing, cited by two of the respondents, with a host of other gaps and needs acknowledged as equally important to other participants. Most processors/producers say they only import items unavailable locally, and make every attempt to source ingredients here on the Island first.

## Local Government

Four people represented the local government sector for the study, including a – City of Duncan Councillor, Cowichan Valley Regional District (CVRD) Environmental Manager, District of North Cowichan Planner, and a District of North Cowichan Councillor.

- Definitions of local food ranged from within the Cowichan Valley to Province-wide.
  - Three participants viewed this question as scalable:
    - One said 20 miles, Cowichan Valley, Vancouver Island, BC.
    - Another said Valley, Island, Province-wide.
    - A third suggested the geographic region of Vancouver Island, Lower Mainland, then the Eco-region.
  - One was quite definite in stating that local means Vancouver Island.
- Those who were consulted feel their levels of government relate very well to farmers and small-scale food producers.
  - The City supports two farmers' markets and recently passed a policy to use only free range/free run eggs for civic events, and they try to be as organic and purchase locally as much as possible.
  - The CVRD say the relationship is a bit complicated as they do not have control over subdivision or the management of the forestry or agriculturally zoned lands.
  - The Regional District Board is very concerned about the resiliency of both the agricultural based and small-scale food producers and recognizes that the context of farming has changed substantially over the past number of years.
  - North Cowichan's Agricultural Advisory Committee includes nine community members who play an advisory role on issues and applications regarding agricultural lands, producer side permits for farm market sales and value-added products and sales.
  - North Cowichan is also consulting to create a strategic plan for the region and expect a Regional Advisory Committee will be formed.
- An Agricultural Plan is operating in one district and in the works in the other.
  - The Agricultural Strategic Plan in North Cowichan is a policy document that guides decision-making and culminated in adopting the Agricultural Strategic Policy in 2002.
  - The CVRD is supporting the development of an agricultural plan through the Economic Development Commission.
  - The City is looking at requiring all new multi-family developments to provide a food producing area in addition to any common areas.
- Most say there is potential for conflict between farmer's needs and developer's needs in their jurisdiction.
  - Water availability:
    - North Cowichan says there is potential for conflict around the water availability issue, and they're now investigating how to provide municipal water for agriculture.
    - The CVRD says access to resources such as water is anticipated to increase.
  - Growth pressure:
    - The growth pressure is quite rapid according to the North Cowichan councillor we spoke to, and municipal policy is to create greater density using urban areas first, and mixed use to preserve green space. The policy is designed to ensure maximum protection of agricultural land. To reduce conflict in the interface between development and farms, vegetative buffers are being used commented the planner.
    - Growing urbanization and development pressures are increasing likelihood of small lot subdivision and conversion to residential use reported the CVRD Environmental Manager.

- The City councillor reports there is no conflict in that municipality.
- The Agricultural Advisory Committee is being handled differently in each area.
  - North Cowichan has a committee who meet monthly to make recommendations to council regarding decisions on applications to remove land from the ALR, are tackling the issue of water for agricultural use and applying for funds to do a study.
  - According to the CVRD, the Economic Development Commission has taken on this role regionally and supports this work but does not believe that creating another group would be beneficial; instead they have decided to support the development of one working group for the area.
  - The City reports that they do not have an Agricultural Advisory Committee.
- Everyone interviewed agreed they are concerned about the level of food production on Vancouver Island.
  - The City says yes, very.
  - The CVRD elaborated to say increased support to local production and capacity is required, and collaborative opportunities for production, secondary manufacturing and sales should be explored. As well, it was suggested a review of the criteria for agricultural lands should be undertaken with a focus on expanding opportunities for appropriate zoning and land use projections (which include non-forage crops).
  - In North Cowichan one says yes, the other gives a qualified 'not so much.'
    - Yes, reviewing the OCP where food security was identified as an issue has led to engaging in a public consultation process and the Community Food Action Plan is being used to inform that process.
    - Not so much concerned on the present environment, however if a natural disaster occurred we have only a one week food supply.
- Local Government presented a variety of ways to support local agriculture.
  - North Cowichan suggested establishing supportive policy structure. They are using public space for community gardens, partnering with gardens and looking at leasing/swapping forestry reserve lands for farming. As well they are taking account of community advice, recommendations, interest, including the Community Food Action Plan.
    - The CVRD recognizes that there are multiple scales required to address this issue at the community level. Land use planning including the Official Community Plan and zoning need to recognize the importance of the issues to both community development and agricultural food security. Various other levers and tools may be available to local government through Bill 27 (Local Government (Green Communities) Statutes Amendment Act, 2008) when it passes.
  - The City suggested talking to local farmers more and addressing their needs.
- Three out of four consider food security and sustainability issues in the Cowichan Valley a serious concern.
  - According to the City Councillor we only need to look at food riots in other countries to see that on the island we are at risk.
  - One participant from North Cowichan reported that the issues are becoming more and more prominent. The other Municipality of North Cowichan representative was not sure, although stated that the Cowichan Food Security Plan identified some issues and the Strategic Plan is in place to address those.
    - Because it's more of an issue this respondent recognized the need to do a better job. Even five years ago the OCP didn't recognize food security was as much of a broad-based issue as today. The cost of transport is going up, and 50 years ago the island produced 90% of food required here, now it's down to 3%.

- An Association of Vancouver Island Coastal Communities was formed to lobby the provincial government to recognize Vancouver Island as a distinct agricultural region.

The local government sector completely agree there is a need for concern regarding the level of food production on the Island, and this theme carries over into their concern for food security and sustainability in the Valley. The main barrier identified is growth pressure and how it impacts agricultural lands. A variety of supports already in place include – the Agricultural Plan, Advisory Committee, Farmer's Markets, and Community Gardens, while constructive approaches still in the works consist of a Regional Strategic Plan, municipal water available for agriculture, food production areas required by multi-family dwellings, Bill 27, utilizing the Community Food Action Plan and leasing/swapping forestry reserve lands for farming.

### **Economic Development Agencies**

We interviewed two people within the Economic Development Agency Sector, comprised of the CVRD's Economic Commission and Community Futures Cowichan. There is a definite awareness around the issue of Food Security and its impact on our local environment, economy, and local food producers.

- Local food was identified as within the service area (Malahat to Ladysmith) and within the 100-mile diet concept.
- Currently, there is no tracking being done regarding the economic impact of local food production activities. The CVRD Economic Commission are aware of the need of this type of information but the infrastructure is not in place to facilitate it at this time.
- An Area Agricultural Plan is being developed, and the CVRD Economic Commission actively promotes the Agri-Food Sector.
- Community Futures Cowichan are currently working with community members on a Food Security Committee.
- Community Futures Cowichan are also developing new directions with the Cowichan Agricultural Society.
- The CVRD Economic Commission are in the midst of developing a local Food Processing Center – they have been working on the business plan, securing tenants, and attracting investors.
- The CVRD Economic Commission actively participate in *Agri-Food Source* and *Eat Vancouver*.
- Economic development agencies look at who is doing what in the region, where the gaps are, and what they can do to assist – for example: succession planning, attracting younger farmers, and unifying the two farmer's markets.
- Resources such as: business advice, business loans, information on how to grow a business, a business retention program, video conferencing and meeting room facilities, are available.

There seems to be a considerable amount of discussion regarding food security issues in this sector. Awareness is high and the activities that they are involved in are multi-leveled. The only apparent disconnect is keeping other sectors and agencies informed of what the current projects are and their progress. There was no awareness in any other sector regarding development of a local Food Processing Center, which is a key element in food sustainability issues for the Valley.

## General Public

A total of 23 individuals responded to our questionnaire. We spent four days in the Duncan Mall soliciting responses. Our experience there was minimal, as most people we encountered were not very willing to participate in the survey. We also spent a day at an Environment Fair held in Duncan, as well as a few days at the Duncan Farmers' Market during Earth Day celebrations and other community events, and had a small number of email inquiries. Because of this, we feel the numbers reflect consumers who are 'in the know' regarding local food, yet they still show some reservations toward buying local.

- Approximately 90% of our respondents are paying attention to the origin of their food when shopping. While there is a strong awareness when shopping, the numbers change when eating out and only 56% of those surveyed pay attention to what local food is available in restaurants.
- Of the 23 participants, 17 reported local food meant Cowichan Valley grown, and three considered Vancouver Island as local. Two considered the Lower Mainland and BC as local. One person mentioned buying Canadian food before food from other countries. Clearly it's a multi-layered approach people take when shopping for food.
- People utilize all opportunities for purchasing local food. Most people purchase food from a local large chain grocery store; however, seven of the 23 participants buy some food at farmers' markets. People also purchase from farmers' markets, farm gates, and through CSAs, as well as local bakeries, cheese shops, farms and meat stores.

The tables below illustrate where people purchase their food. It is obvious people shop at varying locations.

<b>Local Stores (15)</b>			
<b>Store:</b>	<b># people</b>	<b>Store:</b>	<b># people</b>
Farmers' Markets	7	Old Farm Market	2
True Grain	5	Organic Fair	2
Community Farm Store	4	All Over (farm gate etc.)	1
Cowichan Valley Meat Mkt.	4	Ladysmith Market	1
Farmhouse Poultry	3	Own Garden	1
CSAs	2	Providence Farm	1
Hilary's Cheese	2	Russell Farms Market	1
Local Farmers	2		

<b>Chain Stores (8)</b>			
<b>Store:</b>	<b># people</b>	<b>Store:</b>	<b># people</b>
Country Grocer	8	49 <sup>th</sup> Parallel	2
Superstore	6	Safeway	2
Thrifty Foods	5	Save-On Foods	2
Grocery Stores	2	Local Supermarket	1

- Fresh, healthy, better taste, and quality were the adjectives people used to describe locally grown food, and many cited the importance of supporting local farmers and agriculture.
- It is worth noting that four participants get food exclusively from CSAs, farmers markets, or their own gardens.

- Deterrents to buying local were cited as cost, availability of product, and ability to get to the outlets (farm gate, stores, etc.).
- Those surveyed said they prefer:
  - local organic first,
  - local conventional next, and
  - organic imported last.

In general, the persons who participated in the survey were supportive of buying local food. A few participants recognized the higher cost of local food and mentioned that they were 'fortunate' enough to afford it. People take more control over the food they buy for home consumption, and are not as vigilant when they go to restaurants; however, a number mentioned that they had begun to take notice and appreciated the effort when they saw it.

## Stakeholder Meeting

Thirty stakeholders and members of the general public met on the evening of May 28th at the Equinox Café in Duncan. A meal consisting of locally prepared food was served and the group discussed the survey results and next steps. Graham Myers from Maple Groove Farm facilitated the discussion comprised of smaller-land holding farmers, food processors, purchasers, and general public consumers.

A number of topics affecting local farming were addressed at the meeting. Highlights of the discussion include:

- Profitability needs to be guaranteed to give farmers incentive to grow more;
- 15,000 family farms have gone out of business in Canada, and the Cowichan Valley has lost quite a number of farms;
- Farmers are not going to win the cheap import game;
- Small, diversified farms allow people to keep a certain level of control over their operations and they are able to specialize in a certain product and create demand for it – start small, get good at what you do, and then branch out;
- Need to educate the public regarding true cost cheap food; and
- Colleges and other institutions need to offer courses on farming practices to newcomers (youth).

Overall, consensus at the meeting reflected the need to focus on enticing more people to farm and ensure profitability. Selling product is not a major barrier as demand currently outweighs production, and farmers are willing to increase their production if reasonable profitability is ensured, and if the infrastructure and support they need would be available. In order to make farming more viable, more support and education for farmers alongside a strong labour force is needed. The current profit margin is so low because of a variety of factors including structural inequalities (i.e. farm regulations that divide people into who can, or cannot afford to farm), which create an unequal playing field for farmers. Some farmers have been forced to close due to their inability to adhere to certain regulations. Others, who incur the additional expense to meet these regulations see other farms still in operation who are not cooperating with regulations, and that causes division among farmers and exacerbates the inequalities. Stakeholders at the meeting also discussed the need to reinvest in agriculture. The national average of expenditures to the Agri-Food sector is 16.5% of the agriculture GDP, while BC receives ‘the smallest provincial government contribution... at 3.3% of agriculture GDP’ (<http://www.kootenayactivist.ca/Agriculture.htm>). A ‘tongue-in-cheek’ response at the stakeholder meeting strongly supported the notion to declare *farmers an endangered species* in order to showcase the current struggles agriculture faces in the wake of a seemingly apathetic government and general public.

Profits are too small for farming to be financially viable. Value-added products were identified as a feasible means to increasing profits that has not been fully explored. In creating a product, you create an identity and this will create a demand. Farmers at the meeting advised that in order to be successful one must start small, produce a quality product, and grow their operations from that strong base. ‘Small is the new big.’ Building trust between the farmer and consumer is viewed as extremely important to increasing marketability. Creating a unique identity based on quality products, is also viewed as paramount for survival of the local farm.

The Cowichan Valley is not growing a large amount of food, agricultural land is underutilized and is facing a general trend of a decline in the number of farms. With new large developments entering the Cowichan Valley, we need to be proactive in protecting our farmland and the right to farm and the general public needs to recognize the importance of the family farm and farming lifestyle.

Additional actions identified during the meeting include the need to educate the general consumer. It is viewed that the dollar is one of the most important votes people use everyday, and one stakeholder commented that money expenditure illustrates social trends and priorities. Education regarding the farm-

income crisis could further efforts to encourage 'buy local', and increase demand for local retailers to increase the availability of local food. A 'Locally Grown' island in grocery stores, much like an organic section, was suggested as one part of the solution; however, it is recognized that much like the organic section, the island grown section would likely sell out due to the lack of supply. Another action suggested was to create a policy where a certain percentage of local food would have to be purchased before exports are brought in.

Stakeholders at the meeting want to see action and movement to help existing farmers, incentives for more people to become farmers and enough support to facilitate it. More energy needs to be invested to help people grow food, and to sow the seeds of alternatives. It is time to lobby local politicians to pressure them to be active on the issue. More action needs to be taken to focus on creating a friendlier growing environment, where farmers are given the supports they need and new potential farms have an easier time getting started.

## **Appendix A: Survey Questions**

### **1. Farmers:**

- What would make selling your product locally, easier?
- What product(s) do you sell?
- Where are the majority of your product(s) sold?
- Do you have product you are unable to sell each year?

### **2. Grocery Stores:**

- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- What barriers/gaps exist that prevent you from selling (more) 'local food'?
- How much 'locally grown' food do you sell? What is the shortest duration and volume that you would consider purchasing from a single supplier?
- Are you finding there is a demand for 'local food' from your customers/clients?
- Would you be willing to sell more 'local food'?

### **3. Institutions with cafeterias:**

- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- Do you use local food, and if so how much?
- Are you finding there is a demand for local food from your customers/clients?
- Are you informed about food security and sustainability issues in the Cowichan Valley?
- What barriers exist from including more local ingredients on your menu?

### **4. Local Government:**

- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- How does your municipality relate to farmers and small-scale food producers?
- Do you have an agricultural plan?
- Are there conflicts between farmers needs and developers needs in your municipality?
- Do you have a municipal Agriculture Advisory Committee? Is this an active group? What are their achievements?
- Are you concerned about the level of food production on Vancouver Island?
- What can/should local government do to support local agriculture?
- How much of a concern are food security and sustainability issues in the Cowichan Valley?

### **5. Local Economic Development Agencies:**

- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- What is your role/position with regard to supporting local agriculture?
- Do you have an economic development plan related to local agriculture and food system development?
- What is the economic impact of current food production activities in your area?

### **6. Restaurants:**

- Are you involved in the Chef's Collaborative or the North Islands Chef's Association?
- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- Are you finding there is a demand for 'local food' from your customers/clients?
- Are they willing to pay more?
- Do you use 'local products' in your meals? To what degree?
- What is the shortest duration and volume that you would consider purchasing from a single supplier?

- What barriers/gaps exist that prevent you from utilizing (more) 'local' ingredients?

**7. Processors/Producers:**

- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- How much of your product is 'local'?
- How do you source your ingredients?
- Are you aware of the work of the Small Scale Food Processor Association?
- What barriers/gaps exist that prevent you from utilizing/selling (more) 'local food'?

**8. General Public:**

- Do you pay attention to where your food comes from when a) shopping b) ordering in a restaurant?
- Where do you usually buy your food?
- We are finding there are a number of definitions of what is considered 'local food'. What is your definition of 'local food'?
- Local farmer's costs are higher than that of imported food. Are you willing to pay more for locally produced food?
- Do you buy local food? If yes ... why and where? If no ... why not?
- What is your order of preference:
  - Local organic food;
  - Organic food;
  - Local food – conventionally grown?

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