



# Local Agri-Food Strategy

March 31, 2017





# Grey County: A Local Agri-Food Strategy



## *Executive Summary*

This report provides a strategy for the County of Grey to most effectively focus their resources on supporting the County's existing and thriving agri-food sector.

### ***Study Objectives and Methodology***

The study's objectives were fivefold:

1. Provide a snapshot of the agri-food sector in Grey County;
2. Engage stakeholders and review past priorities;
3. Analyze the County food value chain;
4. Conduct a SWOT analysis to assist in the identification of projects with the greatest potential for sector growth, including a "Made in Grey" local food brand;
5. Prepare a strategic plan for use by the Grey County staff in setting priorities and allocating resources.

This Executive Summary reports on each of the five study objectives in turn. The full report contains details for each objective, including the main findings, conclusions, and recommendations.

### ***Objective #1: Provide a snapshot of the agri-food sector in Grey County***

As the study progressed, it became apparent that an effective strategy would need to address the agricultural sector and not just focus on local food. Therefore, the strategy was rebranded as an agri-food strategy and broadened to incorporate primary production. To provide the background necessary to understand the agri-food economy in Grey County, analysis of data from Statistics Canada, the Ontario Ministry of Agriculture, Food, and Rural Affairs, and other sources pertaining to the sector was conducted.

### ***Objective #2: Engage stakeholders and review past priorities***

As part of the background research, interviews were conducted with key stakeholders throughout the County. A survey provided the public with an opportunity to provide input. Two interactive workshops were held during which input was obtained from representatives of the agri-food sector.

### ***Objective #3: Analyze the County food value chain***

In conducting the value chain analysis, it was determined that the inventory of assets required to produce a comprehensive analysis was lacking. Therefore, a partial analysis was completed and actions were incorporated into the strategy to address this weakness.

#### ***Objective #4: Conduct a SWOT analysis***

A SWOT analysis was conducted based on the statistical review, input received at the workshops, through the survey, from targeted interviews, and an assessment of past projects.

#### ***Objective #5: Prepare a local agri-food strategic plan***

As the basis for the strategy, guiding principles based on available resources, the County's mandate, potential partnerships, past experiences, and potential for success were established. These principles were used to evaluate actions and identify those with the greatest potential to "make a difference". The number of actions was limited to ensure that the resources would be available for successful implementation.

#### **A Strategic Plan for Agri-Food in Grey County**

<b>Strategic Focus</b>	
<b>Actions</b>	<b>Tasks</b>
<b><i>A. Provide targeted support to strengthen the County's agricultural sector.</i></b>	
<b>1. Track changes in the sector.</b>	1.1 Using the template provided in Appendix 1 to this report, update agricultural profile with 2016 agricultural census figures.
	1.2 Establish baseline data.
<b>2. Support efforts to protect and expand the land base under production.</b>	2.1 Coordinate with County planning department to implement policies that focus on protection of land base within a framework of flexible policies that support and protect a wide range of agricultural practices.
	2.2 Consider implementation of systems planning for the rural area that addresses and deals with agriculture as a system that requires certain elements (land base, support services, access to land, opportunities for new farmers, appropriate infrastructure) to function efficiently and profitably.
<b>3. Support innovative programming.</b>	3.1 Work with Grey Agricultural Services to support the Alternative Land Use System (ALUS) program that promotes production and protection, thereby balancing agricultural production and environmental protection.



Strategic Focus	
Actions	Tasks
	3.2 Showcase the ALUS program to build support for and understanding of the best practices adhered to by farmers in managing the environment.
<b>4. Support the agri-food sector through infrastructure planning.</b>	4.1 Work with the agri-food sector to identify aspects of public infrastructure supportive of the agri-food sector (e.g. 3 phase power, irrigation, rural road standards, access to broadband). Address these needs in capital planning, or through working with utilities, senior levels of government or partners.
<b><i>B Coordinate services to ensure gaps are addressed.</i></b>	
<b>1. Establish and maintain an agri-food assets map.</b>	1.1 Using existing examples of asset mapping as a template, prepare a digital asset map for the agri-food system in Grey County. Establish a protocol and assign responsibility for keeping the map updated.
<b>2. Identify gaps.</b>	2.1 Using the asset map and the analysis provided in this report identify gaps in the value chain.
<b>3. Establish prioritized, targeted program to address significant gaps.</b>	3.1 Assess critical gaps in the value chain and, based on maximum return and minimum input, support key programs to address these gaps.
<b>4. Prepare an annual report card to evaluate achievements and identify appropriate adjustments.</b>	4.1 Prepare an annual report card based on established indicators to track the health of the County's agri-food sector.
<b><i>C. Support innovation.</i></b>	
<b>1. Provide targeted support (seed money, local food fund, incubation facility) for businesses identified as critical to the agri-food sector.</b>	1.1 Form or strengthen partnerships with other public agencies (Georgian College, agricultural societies, local municipalities) to allocate resources to support identified assets (commercial kitchen, cold storage facilities) with support prioritized on basis of return on investment.

Strategic Focus	
Actions	Tasks
2. Using existing County resources, support introduction of digital tools to support the agri-food sector.	2.1 In coordination with Task B1.1 use data collected as part of Food Link to establish digital database and up-to-date, user friendly, publicly accessible mapping of the agri-food system.
<b>D. Promote Local Product</b>	
1. Leverage success of “Foodland Ontario” brand to develop a targeted “Grey” branding program.	1.1 Develop specific criteria for identifying unique Grey products that could be part of a limited “Made in Grey” branding program that builds on the Foodland Ontario program.
2. Continue support for trails, festivals, and markets.	2.1 Specify the type of event that will be supported by the County and the level of support that will be available. Events should be run by an independent body, be self-sustaining and focus on promoting County agri-food product. Partnerships with local municipalities taking the lead should be given priority.
3. Investigate potential of marketing / branding based on geographic clusters.	3.1 Using the agricultural profile (A1.1) and asset mapping (B1.1) identify geographical clusters of local food production as the basis for encouraging private sector aggregation of services linkages to local consumers (restaurants, markets, retail outlets and direct sale).
<b>E. Build programming partnerships.</b>	
1. Based on identified needs build appropriate partnerships with provincial, municipal, educational, and industry organizations to deliver programming effectively and ensure an efficient use of resources.	1.1 Establish criteria against which to assess which agency or group could most effectively address an issue or need.
	1.2 Partner with local municipalities, boards of education, community colleges to provide targeted programming based on gap analysis (Tasks 2.2.2 & 3).

Strategic Focus	
Actions	Tasks
<b>2. Ensure internal coordination of planning, tourism, and economic development support for agri-food.</b>	2.1 Create an internal county staff based review process to coordinate actions and programing between tourism, planning, and economic development at the County.
<b><i>F. Facilitate links between producers and consumers.</i></b>	
<b>1. Use past experience and related resources to promote linkages.</b>	1.1 Building on analysis of successes and failures, establish best practices for creating and maintaining linkages throughout the value chain.
<b>2. Support networking by making County resources available to assist in establishing and maintaining linkages.</b>	2.1 Based on established best practices, allocate resources to incubate independent networking services that will become self-sustaining.



# Grey County: A Local Agri-Food Strategy

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## **Grey County: A Local Agri-Food Strategy**

### **Chapter 1      Introduction**

#### **1.1    Background and Purpose**

Agriculture is one of Grey County's top economic sectors. The "Made in Grey" Economic Development Strategy, adopted by County Council in April 2015, states

*Agriculture, Farms and Local Food – including farm and non-farm related industrial and commercial activities such as manufacturing, processing and value-adding – are essential components to the economic health and diversity of Grey County.<sup>1</sup>*

Food production, processing, and agri-tourism are essential pieces of the economic health and diversity of the County. Access to and promotion of local food is an increasingly important part of the economic vitality of the County. Direct links between producers and consumers increase farm gate returns and respond to the growing preference for fresh, local product. The County of Grey recognizes the important role local food plays as part of the agri-food sector and has conducted many studies and strategies (Section 2.4), all of which relate back to the agri-food sector and local food in Grey and the surrounding Counties.

The Economic Development Strategy identified the need for a Local Food Strategic Plan to support the local food movement. Initially the purpose of this project was to create this plan; to identify key goals and create or assist with projects fostering the growth of and prosperity associated with local food.

In undertaking the work to establish a Grey County based local food plan it became apparent that, to do this effectively, the strategy's focus would be need to be broadened. Although there is an evolving local food sector in the County, it is intrinsically linked to the broader agri-food system. For the local food system to thrive, the larger system must also thrive. Therefore, the strategy was expanded to incorporate the entire sector and became the "Local Agri-Food Strategy".

#### **1.2    Study Objectives**

The Terms of Reference for the study identified the objectives of the work as the following:

1. Provide a snapshot of the agri-food sector in Grey County;
2. Engage stakeholders and review past priorities;

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<sup>1</sup> Grey County, "Made in Grey" Economic Development Strategy, April 2015, pg 17.

3. Analyze the County food value chain;
4. Conduct an SWOT analysis to assist in the identification of projects with the greatest potential for sector growth, including a “Made in Grey” local food brand;
5. Prepare a strategic plan for use by the Grey County staff in setting priorities and allocating resources.

### **1.3 Report Structure**

The report is divided into five chapters, including this chapter.

**Chapter 2** contains a profile of the agri-food sector based on Statistics Canada (Stats Can) Agricultural Census data for 2006 and 2011, supplemented by data<sup>2</sup> from the Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA).

**Chapter 3** supplements the statistical data with direct input from the agri-food sector in Grey County, obtained through consultations, a questionnaire, and interviews with key stakeholders.

**Chapter 4** defines the food value chain and offers comments on the existing value chain in Grey County.

**Chapter 5** contains a strategic plan to support the County’s involvement in agri-food and specifically the local food sector. Based on the findings of the study, the Strategic Plan will assist Grey County Council and staff in setting priorities and work plans to enhance economic development throughout the region.

### **1.4 Approach and Methodology**

The study was conducted by a consulting team assembled by PLANSCAPE Inc. PLANSCAPE managed the project and was responsible for preparing the research, drafting the online survey, and analyzing the data. Personal interviews were conducted to collect data and build an understanding of the local food initiatives throughout the County. QUEEN'S EXECUTIVE DECISION CENTRE undertook two facilitated sessions that engaged stakeholders and created a short list of priorities in each session.

As noted above, the research methodology included a statistical analysis of data obtained from Stats Can and OMAFRA to prepare a sector profile for the County. A questionnaire was assembled under the direction of Grey County staff and made available to all stakeholders for a period of approximately one month. Interviews were conducted with a sample of stakeholders representing different interests/involvement in the local food sector. Interviewees were selected from a list provided by Grey County staff. This information was combined with input received at two facilitated workshops open to the public.

The entire process was completed within a three-month timeframe.

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<sup>2</sup> Includes data from Economic Modeling Specialists International (EMSI), industrial data and regional occupation data from the Labour Force Survey (LFS) and regional staffing patterns.

## ***Chapter 2      A Snapshot of the Agri-Food Sector in Grey County***

### ***2.1    Introduction***

This section of the report contains a summary of relevant data which provides insight into characteristics and trends in the local agri-food sector in Grey County.

### ***2.2    Agricultural Profile***

Grey County has a strong and well established agricultural sector. Using information from the 2006 and 2011 Agricultural Censuses<sup>3</sup> and data from OMAFRA, a detailed profile of the sector was compiled for the County and each of the local municipalities. These profiles, contained in **Appendix 1a** and summarized in this section, highlight some interesting trends in the County.

The number of farms dropped across the County between 2006 and 2011. This is consistent with provincial trends. Farms are getting bigger across the province and in Grey County. The average farm size increased from 211 acres in 2006 to 218 acres in 2011.

Typically, the decrease in number of farms is significantly greater than the decrease in farmland under production, reflecting the provincial trend to larger operations. However, in Grey this trend is not so pronounced. In Ontario, between 2006 and 2011, the percentage change was -9% in number of farms; -5% in area. In Grey the change was -16% in number of farms versus -13% in farmland area.

In the local municipalities, the most significant decrease in farmland area was in West Grey. The two municipalities which experienced a small increase in land under production were The Blue Mountains and Meaford.

In analyzing these statistics there are several factors that need to be considered. During the period from 2006 to 2011, in addition to fluctuations in markets, the livestock sector was impacted by significant negatives pressures. This is reflected in the change in value of Gross Farm Receipts (GFR's) generated in the County for this sector between 2006 and 2011 and in the decline in number of operations by farm type. To understand the current situation as the basis for effective planning, the trends reflected in the 2016 census need to be considered. These figures are scheduled to be released in May, 2017.

In considering statistics regarding agricultural land, it should be noted that Statistics Canada tracks the amount of land that is under production at the time of the census, not the amount of land designated for agriculture under approved planning policy. To fully assess the status of the agricultural land base, the changes it is undergoing, and the future availability of land for protection, the amount of land that is designated should be calculated and compared to what is under production.

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<sup>3</sup> Data from the 2016 Agricultural Census is scheduled to be released in May 2017.

Gross farm receipts (GFRs) generated increased between 2006 and 2011 in the County and in each of the local municipalities except for The Blue Mountains and Georgian Bluffs. These trends are interesting because, in the case of The Blue Mountains, this decline is inconsistent with the increase in area under production.

The commodity profiles provide some insight into the statistics. The municipalities that experienced the largest drop in land under production were municipalities where livestock operations predominated. As noted previously, the period between 2006 and 2011 was challenging for those sectors.

The profiles also illustrate some interesting geographical differences. Fruit and vegetable production was prominent in The Blue Mountains and Meaford. Dairy is prominent in most municipalities. Poultry and egg was the largest sector in terms of GFRs in West Grey and cattle had a significant presence in Georgian Bluffs, Grey Highlands, Chatsworth, and Meaford.

Other trends in the County are similar to provincial trends. The amount of rental land being farmed is slightly higher than the provincial average and shows an upward trend. Farm costs are rising as is the average age of operators.

In reviewing these profiles, it must be noted that they are based on 2006 and 2011 statistics. The decline in livestock operations reflects the pressures that were on those sectors at the time. Between 2011 and 2016, the next census period, the livestock markets adjusted, commodity prices rose, and there has been a growing demand for agricultural land. Therefore, the trends reflected in these profiles may have shifted. The data from the 2016 Agricultural Census is scheduled for release in May 2017. These new statistics will provide more insight into the trends noted here.

Regardless, the profiles provide some insights that should inform the local agri-food strategy. They underscore the point that there are geographical variations in type and scale of production across the County and raise questions about the rate at which the amount of land in production is declining. In establishing a County wide strategy these points must be considered and addressed. Without a strong primary production system, the local food system cannot flourish.

In developing programs to support production it is important to understand the trends impacting the sector. However, it is also important to allow the sector the flexibility to adjust production to address profitability. Focusing on certain types of production over others should be avoided. Instead actions should provide support for agriculture generally. Ongoing consultation with the agricultural community is essential in understanding and supporting ongoing shifts in production and responding to service needs.

The County is currently undertaking a review of its Official Plan. As part of this process an assessment of trends in the agricultural sector could explain why the changes reflected in the statistics occurred.

# Grey County 2006 — 2011

Number of Farms

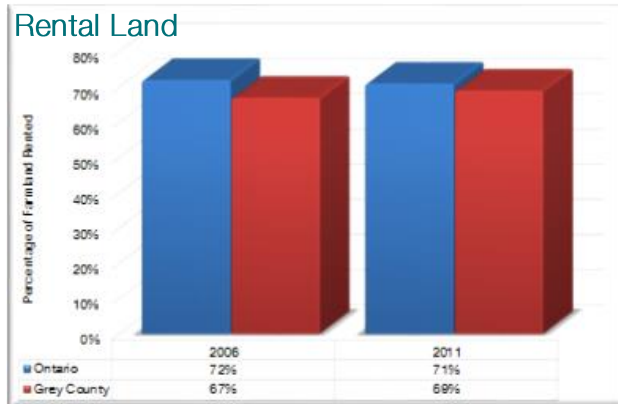
2,687  
↓  
2,248

Average Farm Size (Acres)

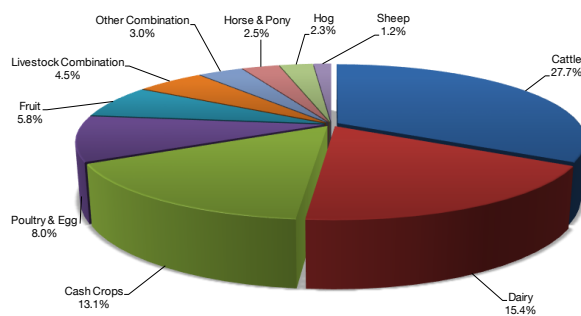
211  
↑  
218

Farmland Area (Acres)

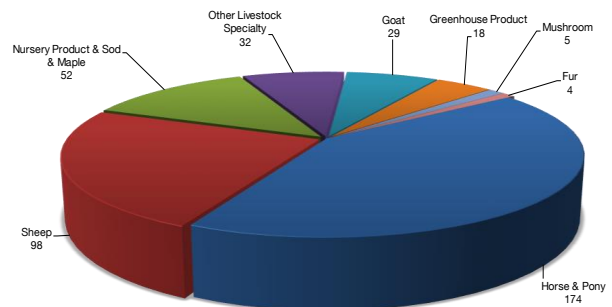
567,212  
↓  
490,707



**Top Ten Commodities (2011)**  
(Gross Farm Receipts)



**Miscellaneous Specialty (Number of Farms)**



Total Gross  
Farm Receipts

\$267,295,850  
↑  
\$288,295,498

Gross Farm Receipts  
(per Acre)

\$471  
↑  
\$588

Operating Costs (per Acre)

\$423  
↑  
\$529

Average Age

52.8  
↑  
54.3

Average Farm Capital

\$798,575  
↑  
\$1,105,846

# West Grey

2006—2011

Number of Farms

604  
↓  
416

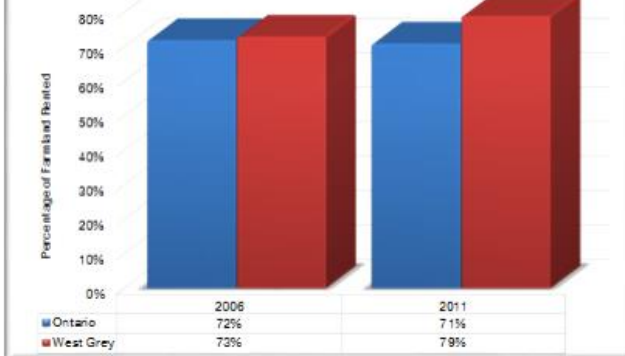
Average Farm Size (Acres)

184  
↓  
178

Farmland Area (Acres)

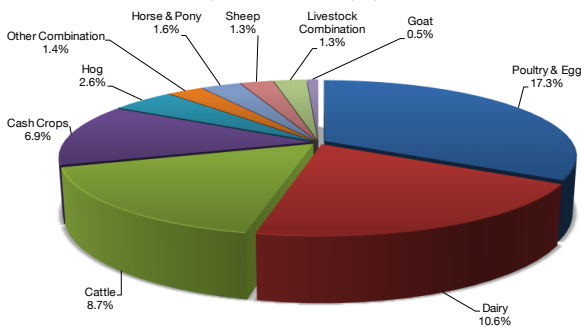
111,177  
↓  
74,228

## Rental Land

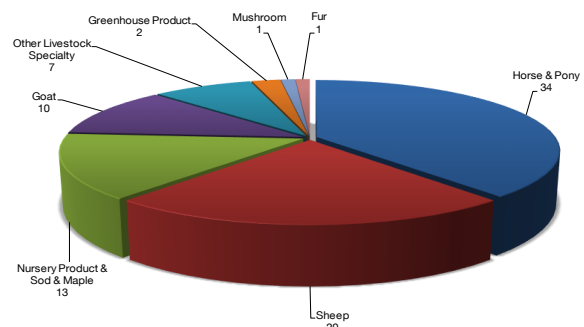


## Top Ten Commodities (2011)

(Gross Farm Receipts)



## Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$84,872,653  
↑  
\$88,062,060

Gross Farm Receipts (per Acre)

\$763  
↑  
\$1,186

Operating Costs (per Acre)

\$658  
↑  
\$1,030

Average Age

53.0  
↑  
54.5

Average Farm Capital

\$795,367  
↑  
\$965,481



# Southgate

2006 – 2011

Number of Farms

454



357

Average Farm Size (Acres)

220



222

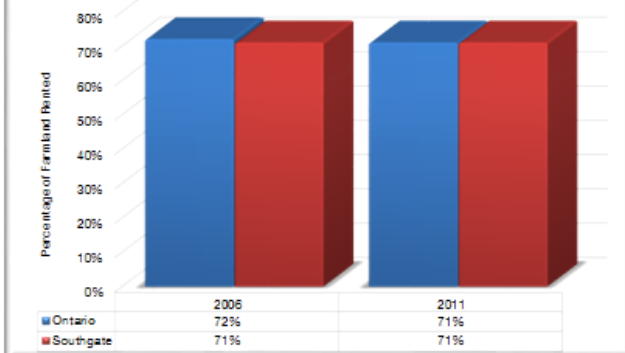
Farmland Area (Acres)

99,784



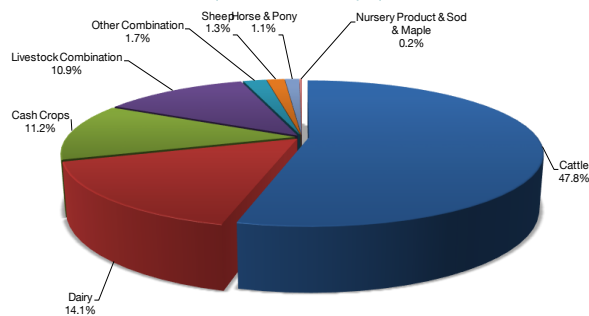
79,346

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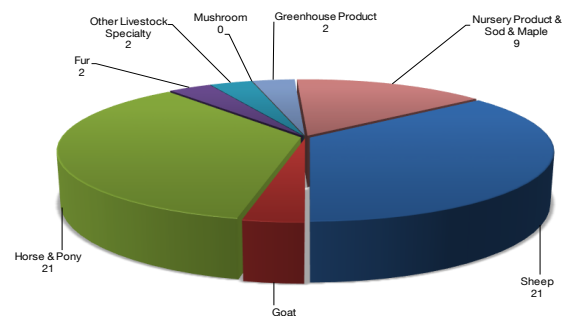


## Top Eight Commodities (2011)

(Gross Farm Receipts)



## Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$54,086,220



\$61,705,569

Gross Farm Receipts (per Acre)

\$542



\$778

Operating Costs (per Acre)

\$477



\$703

Average Age

50.7



51.5

Average Farm Capital

\$812,645



\$1,154,452

# Grey Highlands

2006 — 2011

Number of Farms

507



448

Average Farm Size (Acres)

229



227

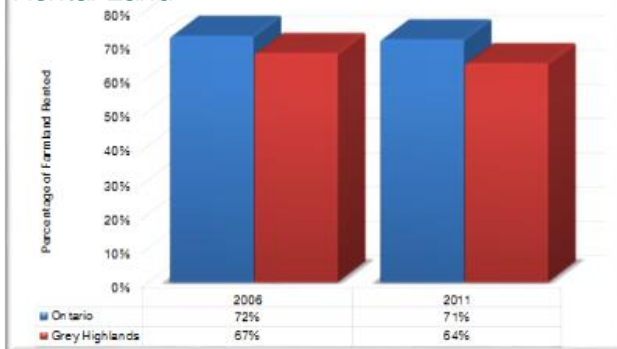
Farmland Area (Acres)

115,886



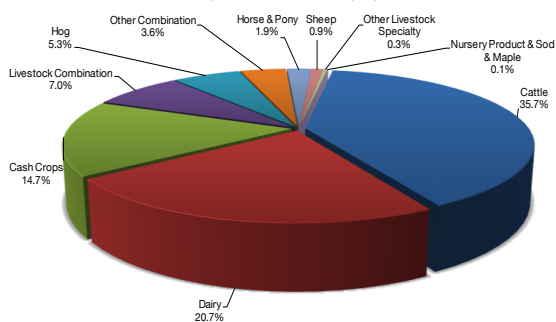
101,918

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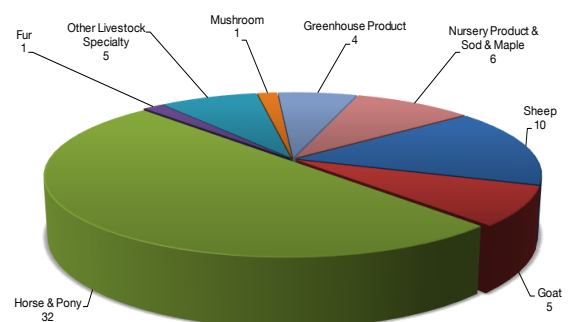


## Top Ten Commodities (2011)

(Gross Farm Receipts)



## Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$36,920,800



\$40,396,638

Gross Farm Receipts (per Acre)

\$319



\$396

Operating Costs (per Acre)

\$296



\$380

Average Age

52.6



54.5

Average Farm Capital

\$880,095



\$1,048,266

# Chatsworth

2006—2011

Number of Farms

375



338

Average Farm Size (Acres)

190



204

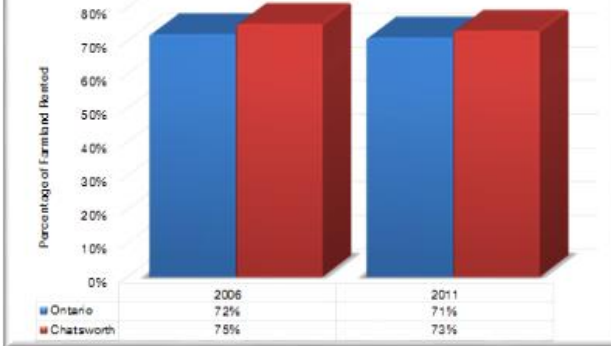
Farmland Area (Acres)

71,362



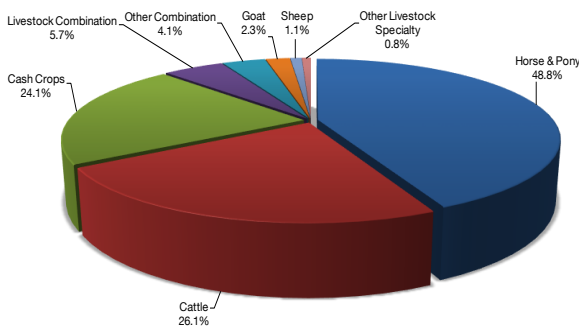
68,829

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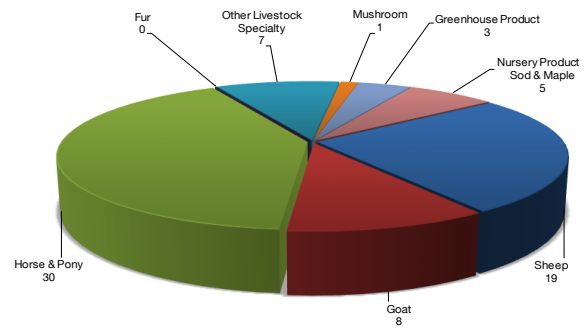


## Top Eight Commodities (2011)

(Gross Farm Receipts)



## Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$22,803,446



\$23,552,874

Gross Farm Receipts (per Acre)

\$320



\$342

Operating Costs (per Acre)

\$315



\$331

Average Age

51.7



53.2

Average Farm Capital

\$621,365



\$897,019

# The Blue Mountains

2006 — 2011

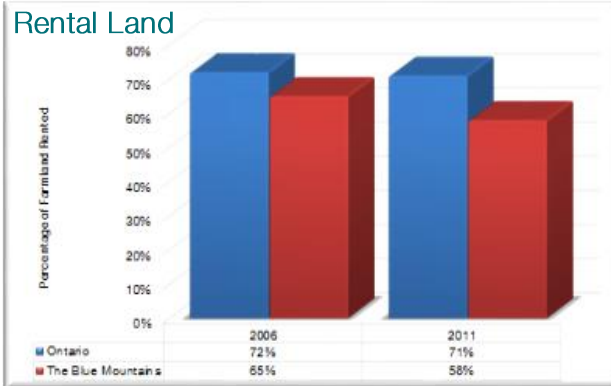
Number of Farms



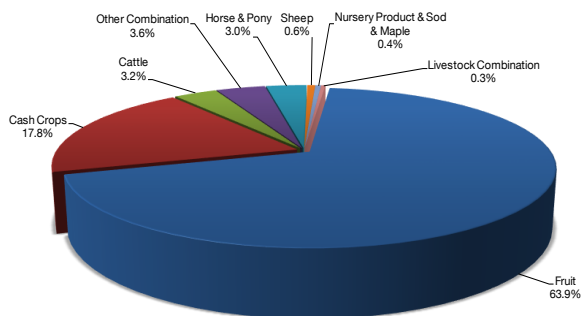
Average Farm Size (Acres)



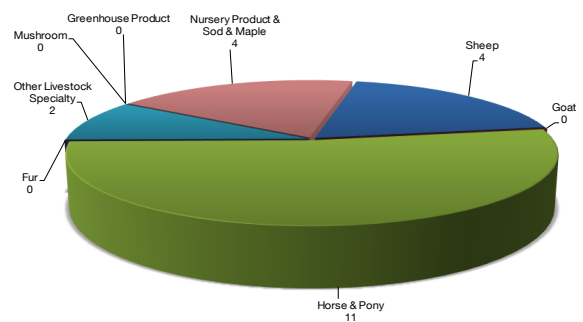
Farm Land Area (Acres)



Top Eight Commodities (2011)  
(Gross Farm Receipts)



Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts



Gross Farm Receipts (per Acre)



Operating Costs (per Acre)



Average Age



Average Farm Capital



# Meaford

2006 – 2011

Number of Farms

316  
↓  
304

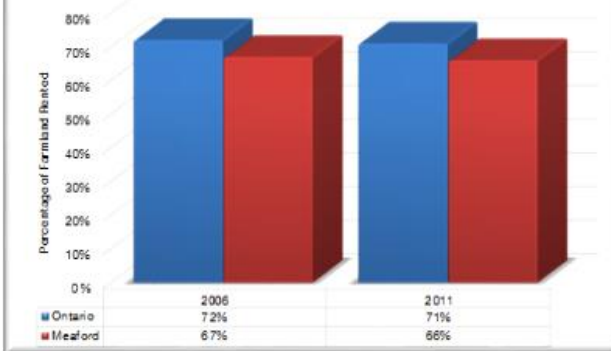
Average Farm Size (Acres)

210  
↑  
228

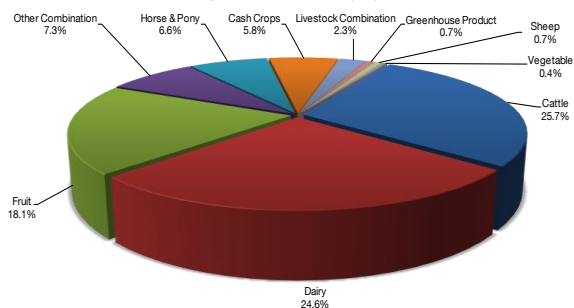
Farmland Area (Acres)

66,252  
↓  
69,299

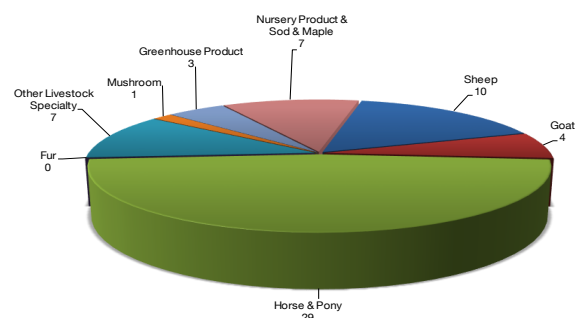
Rental Land



Top Ten Commodities (2011)  
(Gross Farm Receipts)



Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$20,098,600  
↑  
\$28,087,159

Gross Farm Receipts (per Acre)

\$303  
↑  
\$405

Operating Costs (per Acre)

\$295  
↑  
\$367

Average Age

53.9  
↑  
55.9

Average Farm Capital

\$753,922  
↑  
\$1,275,734

# Georgian Bluffs

2006 — 2011

Number of Farms

291



264

Average Farm Size (Acres)

262



266

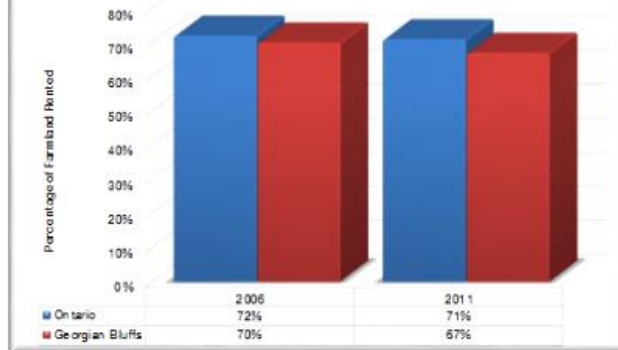
Farmland Area (Acres)

76,098



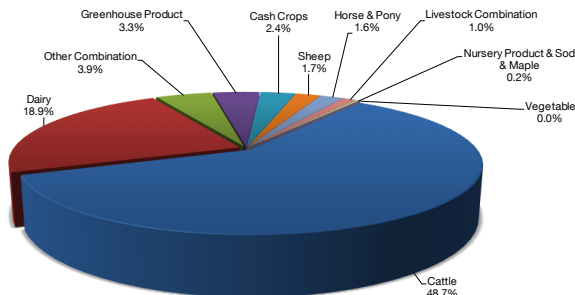
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## Rental Land

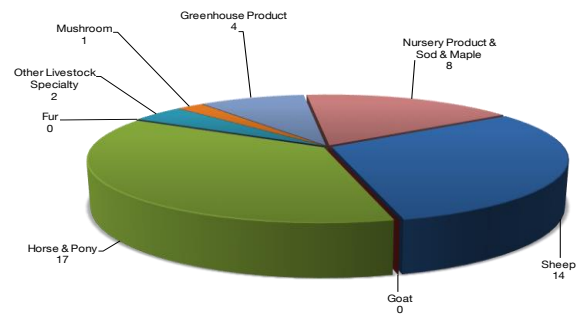


## Top Ten Commodities (2011)

(Gross Farm Receipts)



## Miscellaneous Specialty (Number of Farms)



Total Gross Farm Receipts

\$29,692,397



\$29,303,524

Gross Farm Receipts (per Acre)

\$390



\$417

Operating Costs (per Acre)

\$358



\$358

Average Age

54.4



56.4

Average Farm Capital

\$776,173



\$1,143,014



## 2.3 The Agri-Food Profile

The agri-food profile for the County includes the entire food value chain. The term “food value chain” describes the agri-food sector. According to Agricultural and Agri-Food Canada this sector is comprised of:

- Foodservice;
- Food retail/wholesale;
- Food beverage and tobacco (FBT) processing;
- Primary Agriculture;
- Input and Service Suppliers.<sup>4</sup>

More discussion regarding the County’s food value chain is contained in the next section and in Chapter 4 of this report.

Data is very difficult to obtain for the entire food value chain given its complexity and the fact that it is not defined by political boundaries. Linkages can exist at the local, regional, provincial, national and international levels. However, to establish an effective local agri-food strategy, it is essential to understand the nature of the chain in the County context.

To address this, efforts were made to collect baseline data. The one area in which there was some helpful data was in employment forecasts for sectors in the food value chain. The Province offers a tool called Analyst. It is a web-based application that provides data on regional economies and work forces. It was developed to help economic development professionals better understand their region so they can make informed decisions about how to build strong regional economies.

The data is based on review of historical trends starting from 2007 and projects them into 2022 and is attached in **Appendix 1b**. With respect to number of jobs in 27 selected agri-food related industries (e.g. farms, dairy product manufacturing, grocery stores, beer/wine stores, etc.), projections to 2022 show a 19% increase in employment in Grey County, compared to an increase of 11.1% at the national level.

The projected percentage increase/decrease in the number of jobs in the County within the following industries are worth noting:

Occupation	Percentage
Farms	-13%
Grocery Stores	-22%
Travel accommodation	45%
Restaurants	34%
Dairy manufacturing	73%

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<sup>4</sup> Agriculture and Agri-Food Canada, “An Overview of the Canadian Agriculture and Agri-Food System” 2009, pg xv.

These industries were featured because they experienced the largest increase/decrease in the number of jobs throughout the County. They indicate that there is a slow decline in the number of jobs related to farming (with the exception dairy manufacturing - Chapmans Ice Cream) and a steady increase in tourism related occupations. In response, the County or other organizations could focus attention on hospitality training with connections to local food or encourage new agri-tourism ventures that capitalize on the increase in tourism which in turn create new jobs on the farm.

The top five occupations within the 27 selected agri-food related industries in Grey County are managers in agriculture (19%), food counter/kitchen helpers (10%), general farm workers (9%), cashiers (8%) and cooks (6%).

When reviewing all of the agri-food occupations within the same 27 selected industries, the data shows a projected 3.7% increase to 2022 for the County, compared to the 12.6% national average.

The following occupations show the largest projected increase/decrease within the County:

Occupation	Percentage
Restaurant Managers	-29%
Managers in Agriculture	-26%
Bakers	-39%
Food & Beverage Servers	-25%
Butchers - Local	14%
Butchers - Industrial	-75%
Food Service Supervisors	36%
Chefs	217%
Cooks	75%
Kitchen Help	23%
General Farm Workers	4%

Based on the projections for specific occupations, there is apparently potential for the recently closed, large Federal-run abattoir in Golden, Ontario, to be replaced by local butchers. This will change the business of exporting meat to locally run operations. There is a shift in demand from managerial roles in agriculture to managerial roles in the food and beverage sector. Assistance in the kitchen (prep and cooking) is projected to experience significant growth. These projections provide insight into areas for planning programs and offering assistance. An increase to the number of chefs and cooks could equate to a greater need for locally grown food.

The data referenced here only begins to provide a comprehensive profile of the County agri-food sector. Building a comprehensive profile will require specifically defining the sector in the Grey County context and inventorying existing components. This is a complicated process but recent work in mapping agri-food assets, specifically in the Golden

Horseshoe, is available to inform the process. OMAFRA staff are knowledgeable about this work.

Given the County's size and geographical diversity, it may be helpful to select specific clusters throughout the County to focus on. This could be done on a commodity basis or a sector basis. For example, obtaining baseline data for the value chain related to apple growers and processors could be focused on a commodity. Focusing on the number of restaurants and the linkages to local food are examples of sector based analysis that could be employed.

## ***2.4 Defining the County Agri-Food System***

While the linkages between the components of the agri-food system can be on a local, provincial, national, or international scale, to have a strong local agri-food sector, each of the five components should be present locally. In Grey, although a profile of primary production has now been provided, details about the other components of the agri-food sector are lacking.

To ensure that new or existing projects are effective, the County must develop a means of obtaining base-line data on the agri-food and local food sectors. Some information can be deciphered from the defunct Foodlink Grey Bruce website and through the Grey Bruce Agriculture and Culinary Association. Before the website was shut down earlier this year, it provided listings to over 350 local, direct-sale producers, procurers, processors, retailers, and farmer's markets. Although some of the statistics apply to the neighbouring Bruce County, the majority of these users were from Grey County. The County lends itself to support more local food providers than Bruce, simply due to the differences in the landscape and area of farmlands between these two Counties. The listings give an idea of the number of active stakeholders in the region.

Implementing new programs or moving forward with existing policies, programs, or partnerships must include some way to measure the outcomes. Measurement techniques should be investigated and protocols put in place to capture data. This is a critical step in managing the local and agri-food sectors, and it is a key focus in the Provincial legislation and in funding requirements.

## ***2.5 County Resources***

Upper-tier governments are mandated to do specific things for the communities they serve. Every county or district government is different and the priorities vary throughout the Province. The 2017 Grey County Budget Report and Organizational Chart allocates three personnel to Economic Development within the Region. This department has an operating budget of approximately \$394,000. Beyond the wages and benefits for these individuals, the budget includes money to promote the County by means of advertising (print/radio/internet), promotional material, trade show participation, etc. In addition, there is also a specific budget line to assist in various regional economic development activities and memberships to share best practices and stay on top of new ideas and

programs that can be useful to the region. The County also has separate funds for certain events.

The Economic Development Department also works very closely with the Planning and Tourism Departments as many of their departmental priorities are interrelated. For example, the Official Plan contains agricultural policies that permit accessory on-farm businesses. As part of the County Planning Department's ongoing review of the Official Plan, there will be opportunities to provide input and perhaps expand the existing policy to further enhance or promote new types of on-farm businesses. The Planning Department could also assist in quantifying the amount of agricultural, rural and special agricultural land designated in the County; a number that can then be compared with the Stats Can farmland number.

The departments also share resources (marketing, promotional, etc.) and ideas, and it is apparent that all three of these departments play an integral role in the local agri-food industry. Many of the studies listed in Section 2.4 reveal crossover between the mandates of each of these departments.

The County is already advanced in its role of supporting and promoting local food. There are many examples of local food projects in the County that have proven to be successful and a few that have failed. The County has engaged most of the stakeholders, and there are several existing policies and programs in place that support local food. Most importantly, the Grey Bruce Health Unit created the Grey Bruce Food Charter, and all member municipalities within Grey County have endorsed and support this important initiative.

In addition to the current resources available to the agri-food sector, the following is a snapshot of the programs and the partnerships formed with the County in recent years that contribute to the agri-food sector:

**2014-present - Local Food Week and Ontario Agricultural Week Outreach and Promotion:** Each year in June, Grey County undertakes community outreach during Local Food Week. In 2015, for Ontario Agricultural Week, Grey partnered with Grey Agricultural Services to create a series that profiled 10 producers. These producers were featured in the Owen Sound Sun Times and on Bayshore radio stations.

**2014-present - Ongoing Marketing:** Ongoing marketing includes print, radio, and web advertisements, social media, trade shows and events. These campaigns involved partnerships with Bruce County (through Foodlink – now defunct), the Grey Bruce Agriculture and Culinary Association, the Apple Pie Trail, RT07 (Regional Tourism Organization 7 – Bruce, Grey & Simcoe counties) and others. Trade shows attended with partners include Green Living Show, Taste of Toronto, Toronto Garlic Festival and others.

**2014-2015 - Chef and Restaurant Mentorship:** This was a partnership with Bruce County and the Grey Bruce Agriculture and Culinary Association to provide one-on-one mentorship to select restaurants in order to improve skills, increase local food procurement, and leverage marketing opportunities.

**2014-2015 - Support to Grey County Chefs' Forum Food Hub:** The County supplied funding and administrative support to help build a micro-hub located in South Grey (now defunct).

**2014-2015 - Food Safety Regulations Curriculum Development and Delivery:** Grey County led this project in partnership with Georgian College and with support from Bruce County, Simcoe County, and the Grey Bruce Health Unit. Deliveries of the workshop were held in Owen Sound, Collingwood, and Barrie and are offered regularly by Georgian College.

**2014-present - Food Entrepreneurship (Food-E) Working Group:** Initiated by Georgian College, this working group produces events and curricula for food entrepreneurs in partnership with Grey County, Simcoe County, and other municipal Economic Development Officers. The food entrepreneurship events, including workshops, networking, and trade show components, were held in Owen Sound, Collingwood, Orangeville, and other locations, culminating in a provincial summit in Barrie in 2016. Workshops for food producers continue to be added.

**2016 - Ag 4.0 Summit:** This two-day summit explored the intersection between digital technologies and agriculture. Ag 4.0 brought together representatives from the farm and food community and the technology and creative community with policy-makers and thought-leaders from across the region.

**2016 - Transition Smart Delivery:** This was a program designed by Georgian College and the Agri-Food Management Institute to help farmers create on-farm value adds.

**2017 - Food Entrepreneurship Workshop Series:** This is a series of five workshops being offered in partnership with Simcoe County is designed to help food producers expand markets. Focus areas include pitching to retailers, increasing business-to-business sales, and preparing your farm for agri-tourism.

**2015-present - Grey County Tourism Website:** The new Grey County tourism website features local food extensively through layout, blog content, and media stories.

When reviewing the recent County programs and partnerships, it is apparent that there is a healthy support for the production, processing, retail, and tourism components of the agri-food sector. As local food is a subset of each of these components, the County must take stock of their asset inventory throughout the agri-food systems before they can successfully deploy resources (money/personnel, etc.) to specific sectors or subsets of this system.

## ***2.6 Other Tools for Supporting Agri-Food***

The Province and other organizations recognize the importance of agri-food to the provincial economy and have provided support for the sector at the local level. There is legislation addressing local food, many relevant agri-food and local food related studies and personnel at various agencies that offer guidance and assistance to the agri-food industries.

The legislation, reports and agencies should be recognized, reviewed and consulted when setting new strategies and supporting existing successful programs. The following was reviewed as part of this strategy:

#### Legislation

- Local Food Act”, 2013
- Ontario's Local Food Strategy
- Ontario's Local Food Report. OMAFRA, 2015/16 Edition

#### Reports Focused on Local Food:

- “Best Practices in Local Food - A Guide for Municipalities”. Deloitte, 2013
- “Grey County Apples - A Planning and Development Perspective: Challenges and Opportunities”. University of Guelph, 2011
- “On-Farm Business Policy Review. Grey County”. University of Waterloo, 2015
- “Broader Public Sector Institutional Local Food Project”, Grey Bruce Health Unit and Foodlink. Grey Bruce, 2012
- “The Rural Grocery Store Project”, Saugeen Economic Development Corporation, 2013
- “A Snapshot of the Local Food System in Grey Bruce”. Grey Bruce Agriculture and Culinary Association, 2010
- “Nourishing Communities Food Hub Case Study Report”. Grey Bruce Local Food Project. Wilfrid Laurier University, Fall 2014/Winter 2015
- “Grey Highlands - Agricultural Business Retention and Expansion”. Markdale Chamber of Commerce, 2010
- “Grey County Rural Guide”. Grey County Agricultural Services, 2016

#### Reports that Include a Local Food Component:

- “County of Grey Official Plan Policies – Review of Minimum Lot Size Requirements and Impact on Agricultural Operations”. University of Waterloo, 2016
- “Economic Impact and Feasibility Study for Wiarton-Keppel International Airport”. Explorer Solutions, 2016
- “Grey County Tourism Destination Development Action Plan 2016”. Bannikin Travel & Tourism, 2016
- “‘Made in Grey’ Economic Development Strategy”. McSweeney and Associates, 2015
- “Grey County Corporate Strategic Plan”, 2017-2019



## Agencies/Organizations

- Ontario Ministry of Agriculture and Rural Affairs – Economic Development Advisors, Domestic Marketing Unit, etc.
- Member-municipalities – Economic Development Officers, BIA, etc.
- Not-for-Profit Organizations – Eat Local Grey/Bruce, Ontario Culinary Tourism Alliance, Grey Bruce Agriculture & Culinary Association, etc.
- Agriculture Organizations – Ontario Federation of Agriculture, Christian Farmers Federation of Ontario, etc.
- Businesses – FreshSpoke, etc.

## 2.7 *Agri-Tourism*

Tourism is an important part of the County's function as a promoter of economic development. This function contributes resources (financial or staff) to assist with many regional and local agri-tourism ventures. The County provides support for the "Saints & Sinners Agri-Culinary Trail Development". Originally an event-based partnership with Grey Roots Museum and Archives, SUMAC (Simcoe County's Cultural Network) and RT07 (BruceGreySimcoe.com), Saints & Sinners has recently expanded to include a passport-style trail map, a signature event, a contest, and branded merchandise. During the last festival, a total of 20 producers and 14 municipal and cultural partners participated.

Other festivals and trails include the Apple Pie Trail and Butter Tarts and Buggies, and there are many other local, member-municipalities or BIA community festivals. All of the member-municipalities have staff who focus on local economic development activities and functions.

Agri-tourism is growing throughout the County, and there will always be a need to support and contribute to the numerous festivals and agri-tourism ventures. However, beyond assisting with promotion, and offering general support, the County should focus more of their attention on the other agri-food sectors throughout the County.

## ***Chapter 3      Input from Local Food Stakeholders in Grey County***

### ***3.1    Public Engagement (Surveys, Workshops, and Interviews)***

In this chapter, the results of the public engagement process are reported. The engagement consisted of a public survey, in-depth interviews with selected stakeholders, and two brainstorming workshops. The process is described in detail below, after which, the responses received are reported and then an overview of the major perceptions and findings resulting from the investigation is presented. This input, combined with the statistical overview in Chapter 2, provides the context for the subsequent analysis presented in the report and forms the basis for the strategy developed.

### ***3.2    Data Collection Process***

Three basic data collection strategies were employed. First, an on-line survey was made available to all stakeholders in the sector in an attempt to provide all with an opportunity to participate. Second, two workshops that were open to the public were held to obtain input from stakeholders. Third, detailed in-person and phone interviews with various agri-food stakeholders were conducted to probe more deeply into issues in the sector.

Each of these data collection methodologies is described in turn.

#### **Workshops**

The first of two public workshops were held on January 18, 2017 in Flesherton. Thirty-one participants reviewed and ranked six local food priorities that were found in the 2015 “Made in Grey” Economic Development Strategy. The group brainstormed over 60 potential new projects and were asked to narrow these down to 15 based on importance, feasibility, and potential for County involvement. Individuals then voted on their top six projects and these projects were narrowed down to the top eight projects by including the rationale and objectives for each project.

The selected projects/ideas from the first session included:

1. **A Grey County branding and marketing program:** This could be similar to VQA in the wine industry and should include the creation of a separate website for marketing Grey County.
2. **A Grey County processing center:** The county should consider and research a processing center for Grey County.
3. **A micro granting program:** The County could assist with the provision of a micro granting program. This could include such aspects as lenders, pool of money/funding opportunities, simple, easy application processes, and seed funding.

4. **A County led social media campaign:** The County could make short videos of a variety of local food producers for use on social media. These videos could be used to compare local food to imported food (apples from Grey verses apples from China). The goal would be to provide education and sustainability for agri-tourism.
5. **Support for the Foodlink Grey/Bruce website:** The County should reconsider supporting the now defunct Foodlink Grey/Bruce website. This would provide better connections between producers, suppliers, and consumers.
6. **Create and promote soil stewardship programs:** The County could create and promote soil stewardship programs by providing grants, education, and/or mentorship.
7. **Initiatives to enhance local spending and procurement:** The County could promote or provide initiatives to encourage individuals to spend locally. The County should also assist with the creation of a policy for all Grey County facilities to purchase from Grey producers first.
8. **Support local farmer's markets:** Grey County should support all local farmer's markets via funding, advertising, listings, etc. It should also partner and collaborate with Ontario Travel, OMAFRA, etc.

Using the same format described above, the second public workshop was held on February 13, 2017 in Owen Sound. Forty participants brainstormed over 50 potential projects. The following top seven projects were selected:

1. **Marketing and branding a Grey County Strategy:** The County could advance the next stage of a marketing strategy like the "Made in Grey" campaign that was just completed. This marketing strategy needs to be outward-focused, support Grey County identity, promote County recognition, and provide brand awareness.
2. **Farmer education and mentorship:** A mentorship program could be developed that focuses on farming, business and finance skills, food safety, etc. The goal would be to help move business forward. This could also involve coaching/mentorship and the provision of an incubator farm facilitated by the County.
3. **A processing space:** A commercial kitchen and food processing/storage space is needed for producing and canning food for commercial sale. Assistance is also needed to help farmers and processors understand and overcome the current regulations and higher costs of Provincial animal processing. The County should consider the loss or limited kill floors and provide better access to butcher shops in Grey County;
4. **Source more local food for institutional sales:** The County should facilitate, promote, and support access to healthy and local foods in public spaces, including health care facilities, educational facilities, etc.
5. **Incubator financing / Micro grants / funding networks:** These would help to support agriculture/food producer businesses.

6. **Connect the agri-food system and create a communication hub:** This could accomplish five things:
  1. Create a purchasing network of producers with small stands or small stores.
  2. Provide recycling opportunities to connect farmers to groups like foodbanks.
  3. Connect the agri-food system by aligning partnerships of producers, distributors, and processors.
  4. Create an inventory of products/farms/experiences.
  5. Create a formal communication system to link farmers/producers with the County.
7. **County directory:** A county directory could put everything in one spot where we can find information, mentorship, counselling, startup, growth assistance etc.

**Appendix 2** contains summaries of the ideas presented at these workshops.

## **Sector Survey**

Through consultation with Grey County staff, a detailed on-line survey was developed and made available to the public for approximately one month. This questionnaire probed into trends in the local agri-food industry (from production to consumption), and into the County's role in supporting the local agri-food sector. The questionnaire was advertised through email notifications and direct contact. In total, 111 responses were received. A copy of the survey itself, with a summary of all responses, can be found in **Appendices 3 and 4**.

The respondents came from a diverse variety of backgrounds, but most identified their primary role in the local food economy as a consumer (71%), primary producer (41%), and/or change agent (30%) (participants were permitted to select more than one role). The majority (75%) identified their desire to support local growers and the economy as their reason for engagement with the local food system; other important factors included interest in sustainable farming practices and environmental concerns, food quality, and economic livelihood. Most respondents demonstrated prior participation in the local food economy through their shopping preferences. More than 60% of respondents indicated having purchased their food at a local grocery store or market, at a farm gate sale, or at a farmer's market. These individuals most commonly purchased fruits and vegetables, meat, poultry, fish, maple syrup, honey, and eggs.

When asked to choose from a list of organizations which they saw the most value in, majority of respondents identified the Grey Bruce Agricultural and Culinary Association as most valuable. This was followed closely by the Eat Local Grey Bruce Co-op, and Foodland Ontario. Respondents also stressed the importance of using their own resources to buy and support local food as well as the role that the County and Municipal Governments should play in supporting and promoting local food.

## **Interviews with Key Stakeholders**

In addition to the sector survey, a series of one-on-one in-person and phone interviews with stakeholders was completed. In total, five in-person and 19 telephone interviews were conducted. Most of these individuals attended one of the facilitated sessions, so the interviews were somewhat informal. The interviews provided an opportunity to clarify some of the themes and to ask if there was anything else the County could do to help local food stakeholders. A summary of these discussions is included in **Appendix 5**.

### ***3.3 Themes from the Data Collection***

Throughout the data collection process, participants, respondents, and interviewees were asked to identify priorities and initiatives that would enhance the local agri-food sector. These individuals also provided suggestions and additional comments relating to the County's role in the support and development of that sector. There were five key areas of focus that appeared commonly in the diverse responses. These themes are detailed below.

#### **Community Education**

Many respondents stressed the need for enhanced community education in the County as essential to the growth and sustainability of the agri-food economy. Respondents suggested a variety of forms and focuses for community education. Many stressed the need to educate local consumers about the value and importance of supporting and eating local food. Some suggested a need for engagement with the youth community to foster interest in local food both from a consumer and producer perspective. Others stressed the need for educational opportunities for farmers and rural entrepreneurs to enable them to learn strategies for profitably and sustainably producing local product and ensuring continued soil stewardship. A variety of educational forms were suggested ranging from local education series, to education in schools targeting young people, to farm visits, to mentorship programs, to the development of a website that would give farmers and entrepreneurs access to resources and opportunities for discussion, to community events designed not only to bring people together but to educate community members on the importance of food - some suggested events include food fairs, chef tours, food entrepreneur workshops, conferences, etc. The overwhelming theme was that educational opportunities presented in engaging ways would not only enhance the local food economy but connect producers, processors, and consumers within the community.

#### **Support**

Respondents identified support for farmers as one of the key needs of the agri-food community. Micro-grants and other financial supports were suggested to encourage the sustainable production of local food, to support those farmers already producing local product, and to encourage entrepreneurship in this field. Educational opportunities about soil stewardship, marketing, business development, etc., could also provide support to farmers trying to grow their businesses. Many respondents stressed that support is needed in processing and distributing food. A food hub was suggested as a way to help producers process and distribute their food. A community Board of Health certified kitchen, in which small producers could produce their product, was also proposed. The need for the County

to lead by example through the procurement of local food was also evident, and many stressed the importance of promoting the use of local food in the public facilities – schools, hospitals, nursing homes, etc. (although it is recognized that these facilities are outside of the County’s jurisdiction).

### **Accessibility**

Many respondents felt that local food was not accessible enough at a community level for a variety of reasons and that, for the food economy to grow, local food must be easy for consumers to access. Respondents stressed the need to support farmer’s markets as a space for consumers to access local product, as well as the need to bring local food into grocery stores, perhaps through providing incentives. Some also suggested using a food hub as a space not only to process and distribute local food to wider markets, but to give locals and tourists an opportunity to experience Grey County food and shop for everything in one place. Food festivals, cooking classes, and other community events that highlight local food were also frequently suggested. A final concern raised was the discrepancy between the cost of local food and imported food, and the need to make local food affordable to all people living in Grey County.

### **Marketing**

Respondents also recognized and emphasized the need for greater marketing of Grey County product both within the community and outside of it. Suggestions were made for the creation of a Grey County brand that is unique and recognizable – like that evident in Prince Edward County or Niagara. The brand should support what is good and unique about the food in Grey County, including the unique soil. Marketing of local food should align with tourism initiatives and seek to draw people to Grey County through emphasizing a uniquely branded food culture. Respondents stressed that marketing also needs to occur within the community to make local consumers aware of what is available in their own region. Community events and festivals were put forward as a way to both draw tourists from outside and encourage local participation in the food economy. Respondents also stressed the need for a greater degree of information on local producers and their product on the internet and a stronger web/social media presence for the local food scene in Grey County.

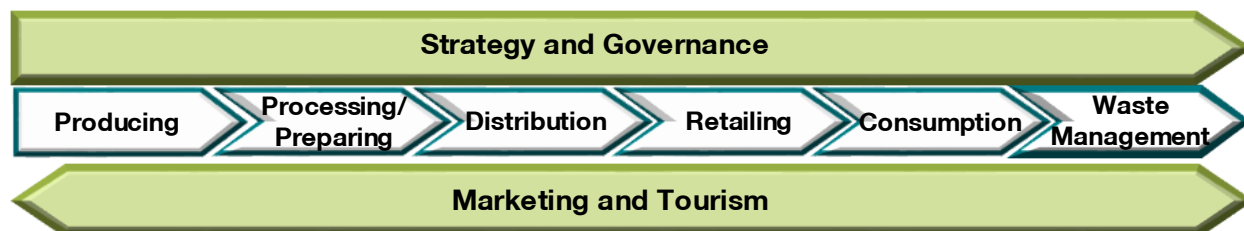
### **Sustainability**

Many respondents stressed the need for sustainable farming practices to be promoted and supported within Grey County. Of particular concern was soil stewardship and the need to preserve the County’s unique agricultural environment to ensure the longevity of local food production. Education, grants, and rewards were suggested as a means of helping farmers and producers use sustainable farming practices. Sustainable farming practices and soil stewardship were stressed as vital to the survival of the County’s local food scene. The need to help farmers maintain profitability as well as sustainable farming practices was also stressed, and many respondents emphasized the financial challenges facing some farmers – particularly of small farms. Local food must be sustainable from a financial as well as environmental perspective.

## Chapter 4 Value Chain Analysis

### 4.1 The Value Chain Current Status

The 2013 Deloitte Report, “Best Practices in Local Food – A Guide for Municipalities” provides a diagram illustrating the links in a successful local agri-food network. Below the diagram is a brief definition of each link.



**Producing:** Growing agricultural products and raising livestock in existing farming operations throughout Grey County.

**Processing/Preparing:** Transforming these agricultural products into another form as market-ready products through such things as washing, peeling, packaging, cutting, etc.

**Distributing:** Warehousing, collecting and storing produce and/or processed goods and delivering them to target markets and retailers.

**Retailing:** The window to the consumer. Where one sells the produce and/or processed goods to individuals, through retail stores, farmers markets, or online stores.

**Consuming:** Enjoying the produce and/or processed goods at home, restaurants, or other venues of consumption.

**Waste management:** The collection, delivery and disposing or recycling of waste materials from food products.<sup>5</sup>

The six steps in the food value chain provide a structure that Grey County should use to review and assess their existing capabilities, approaches, and gaps in agri-food management. Grey County cannot be responsible for certain links within the food chain. Not only are they constrained by their jurisdictional authority, the mandates set out by the Province of Ontario, and the direction of the current Council, but the private sector also has a pivotal role to play in providing the links. However, the County should conduct a specific review of each step to understand the entire process and identify areas where the County can help.

<sup>5</sup> Deloitte, “Best Practises in Local Food” 2013, pg 2.



Under the existing mandates of the County government, the County can provide or influence two overarching principles that span the entire chain. They include Strategy and Governance (e.g. Official Plan policies, Food Charters, etc.), and Marketing and Tourism initiatives through the existing Economic Development and Tourism Departments.

The current status of the food value chain in Grey County is difficult to assess due to the lack of an inventory of assets. This agri-food strategy provides the direction needed to understand the status of the food value chain, including the collection of baseline data and a complete inventory of assets. Both are required to appropriately monitor the successes of future programming through Grey County and its support of the agri-food sector over time.

## 4.2 SWOT Analysis

In order to strategically prioritize the focus of Grey County, a “SWOT” analysis was conducted on the preliminary findings of this study. A **SWOT analysis** is a structured planning method used to evaluate the strengths, weaknesses, opportunities, and threats associated with a sector. This analysis was conducted based on the consultations, input from the interviews and workshops, and research conducted for the study. The key findings from the “SWOT” analysis is summarized in the following sections.





Analysis of the key findings confirms that developing an effective agri-food strategy in Grey County will be complex. The range of actions that could be implemented is broad. To be effective, the strategy must focus on key actions that the County can effectively undertake. The SWOT analysis assists in selecting and prioritizing these actions and ensuring that those which will be most effective in sustaining a healthy agri-food community are implemented. Applying this analysis to determining what these actions should be is the focus of developing the agri-food strategy.

### **Strengths**

- Strong support for local food
- Tradition of supporting local producers
- Emerging local food network
- Political support
- Healthy tourism market
- Range and nature of product
- Close to major markets and urban consumers
- Long-term planning policies recognizing and supporting agriculture
- Appeal of small community and rural lifestyle in close proximity to major recreational centres and urban areas
- Access to nature, rural recreation, and Georgian Bay
- Established agricultural sector
- Range of products (apples, etc.)

## **Opportunities**

- Coordination of programs
- Strengthening infrastructure
- Managing links between producers and consumers
- Education
- Promotion of targeted programs
- Public agency programs
- Not-for-profit organizations
- Private businesses promoting local food
- Use of various planning tools - agricultural-based community improvement plans, site plan control, development permits, etc.
- Coordination with the Health Unit and Boards of Education to promote healthy living and access to fresh, local food
- Ensuring that the updated Grey County Official Plan policies implement innovative policies to support new agricultural trends and development
- Maintaining partnerships with Georgian College and other educational institutions
- Leveraging the Local Food Act and government commitments to support consumer awareness and education, access, and ensuring there is sufficient supply of local food

### **Threats**

- Layers of regulatory controls increases complexity, cost and length of time to obtain approvals, and decreases certainty about securing permissions (e.g. Saugeen, Grey Sauble Conservation Authorities, Niagara Escarpment Commission, Provincial Ministries, Grey County, local municipalities)
- Restrictive/limiting land use regulations (e.g. farm severances, limits to the number of on-farm employees, small manufacturing on Mennonite farms, etc.)
- Growth drives demand, thereby increasing land values to a point where it may be unaffordable for agricultural production
- Conflicts between agricultural users of the land and urban-oriented residents

### **Weaknesses**

- Failure to coordinate
- Small producers
- Seasonal product and market
- Limited resources
- Lack of data about the County agri-food system
- Topography, soil composition, and fertility
- Short term projects
- Size and geographical diversity of County resulting in divergent needs
- Cost of land makes acquisition for farm purposes uneconomical
- Poor internet and cell services in some areas

## ***Chapter 5 A Strategic Plan to Support the Agri-Food and Local Food Sectors in Grey County***

### ***5.1 The Agri-Food Sector in Grey County***

Grey County is home to a well-established rural community supported by attractive towns and villages. Residents enjoy a balanced life style with opportunities to connect with nature. An integral part of the County character is an established agri-food system that links producers and consumers. However, despite being well-established, the potential of the local agri-food system is not being optimized. Additional actions are required to understand the system and target support so it is more effective. To achieve this, the County is implementing a “Local Agri-Food Strategic Plan.

There are numerous factors that contribute to the strength of the County’s local agri-food sector.

- Strong public and political support for local agri-food operations;
- Growing demand for local food;
- Recognition that local sustainability is key to a healthy community;
- Agri-food business opportunities can be at a scale well suited to rural communities;
- Recreational amenities in and in close proximity to Grey County attract a large sophisticated market interested in local product;
- Presence of a mature well-established agricultural community producing a range of commodities;
- Partner agencies interested in supporting local agri-food opportunities;
- Growing education focus on agri-food related employment;
- Capacity for local entrepreneurship and innovation.

### ***5.2 Key Issues***

Despite the strength of the County’s local agri-food sector the consultations and research done in support of the strategy identified a number of issues that need to be addressed in the strategy.

- The extent and composition of the sector is not well defined.
- There is no inventory of assets that can be used as the basis for a gap analysis to identify what essential elements are lacking.
- Although steps have been taken to define and support the sector, many of these actions have been short term, disjointed and unsuccessful.
- The size and geographical diversity of the County makes implementation of “one size fits all” programming inappropriate.
- There is a lack of coordination in programming.
- Inefficient and inconsistent use of limited resources.

- Poorly defined partnerships.
- Lack of support for the incubation of new businesses.
- Challenges with linking producers and consumers efficiently.

### **5.3 Guiding Principles**

The County cannot solve all of the issues related to local agri-food. It is limited in mandate, resources and the ability to be effective in solving certain issues. A careful assessment was done of each recommended task and actions to confirm they satisfied the following guiding principle of:

1. Being within the County mandate;
2. Having greatest potential to support and foster a successful and prosperous County agri-food sector;
3. Responding to specific County circumstances;
4. Optimizing the use of County resources;
5. Building on and benefiting from the action of others;
6. Maximizing opportunities for strategic partnerships.

### **5.4 Vision**

If the strategy is successful, the vision for Grey County is to foster:

*A strong, vibrant, well defined local agri-food sector which links producers and consumers, provides opportunities for innovation and economic development, builds on partnerships and adds to quality of life in Grey County.*

### **5.5 Strategic Focus, Actions, and Tasks**

Based on the research and consultation that was conducted, it was determined that the strategy should build around six areas of focus:

- A. Provide targeted support to strengthen the County's agricultural sector;
- B. Coordinate services to ensure gaps are addressed;
- C. Support innovation;
- D. Promote Local Product;
- E. Build partnerships;
- F. Facilitate links between producers and consumers.

Actions with related tasks were then identified for each area of strategic focus.

Strategic Focus	
Actions	Tasks
<b><i>B. Provide targeted support to strengthen the County's agricultural sector.</i></b>	
<b>2. Track changes in the sector.</b>	1.1 Using the template provided in Appendix 1 to this report, update agricultural profile with 2016 agricultural census figures.
	1.2 Establish baseline data.
<b>2. Support efforts to protect and expand the land base under production.</b>	2.1 Coordinate with County planning department to implement policies that focus on protection of land base within a framework of flexible policies that support and protect a wide range of agricultural practices.
	2.2 Consider implementation of systems planning for the rural area that addresses and deals with agriculture as a system that requires certain elements (land base, support services, access to land, opportunities for new farmers, appropriate infrastructure) to function efficiently and profitably.
<b>3. Support innovative programming.</b>	3.1 Work with Grey Agricultural Services to support the Alternative Land Use System (ALUS) program that promotes production and protection, thereby balancing agricultural production and environmental protection.
	3.2 Showcase the ALUS program to build support for and understanding of the best practices adhered to by farmers in managing the environment.
<b>4. Support the agri-food sector through infrastructure planning.</b>	4.1 Work with the agri-food sector to identify aspects of public infrastructure supportive of the agri-food sector (e.g. 3 phase power, irrigation, rural road standards, access to broadband). Address these needs in capital planning, or through working with utilities, senior levels of government or partners.
<b><i>B Coordinate services to ensure gaps are addressed.</i></b>	
<b>5. Establish and maintain an agri-food assets map.</b>	1.1 Using existing examples of asset mapping as a template, prepare a digital asset map for the agri-food system in Grey County. Establish a protocol and

Strategic Focus	
Actions	Tasks
	assign responsibility for keeping the map updated.
<b>6. Identify gaps.</b>	2.1 Using the asset map and the analysis provided in this report identify gaps in the value chain.
<b>7. Establish prioritized, targeted program to address significant gaps.</b>	3.1 Assess critical gaps in the value chain and, based on maximum return and minimum input, support key programs to address these gaps.
<b>8. Prepare an annual report card to evaluate achievements and identify appropriate adjustments.</b>	4.1 Prepare an annual report card based on established indicators to track the health of the County's agri-food sector.
<b>C. Support innovation.</b>	
<b>1. Provide targeted support (seed money, local food fund, incubation facility) for businesses identified as critical to the agri-food sector.</b>	1.1 Form or strengthen partnerships with other public agencies (Georgian College, agricultural societies, local municipalities) to allocate resources to support identified assets (commercial kitchen, cold storage facilities) with support prioritized on basis of return on investment.
<b>2. Using existing County resources, support introduction of digital tools to support the agri-food sector.</b>	2.1 In coordination with Task B1.1 use data collected as part of Food Link to establish digital database and up-to-date, user friendly, publicly accessible mapping of the agri-food system.
<b>D. Promote Local Product</b>	
<b>4. Leverage success of "Foodland Ontario" brand to develop a targeted "Grey" branding program.</b>	1.1 Develop specific criteria for identifying unique Grey products that could be part of a limited "Made in Grey" branding program that builds on the Foodland Ontario program.
<b>5. Continue support for trails, festivals, and markets.</b>	2.1 Specify the type of event that will be supported by the County and the level of support that will be available. Events should be run by an independent body, be self-sustaining and focus on promoting

Strategic Focus	
Actions	Tasks
	County agri-food product. Partnerships with local municipalities taking the lead should be given priority.
<b>6. Investigate potential of marketing / branding based on geographic clusters.</b>	3.1 Using the agricultural profile (A1.1) and asset mapping (B1.1) identify geographical clusters of local food production as the basis for encouraging private sector aggregation of services linkages to local consumers (restaurants, markets, retail outlets and direct sale).
<b>E. Build programming partnerships.</b>	
<b>1. Based on identified needs build appropriate partnerships with provincial, municipal, educational, and industry organizations to deliver programming effectively and ensure an efficient use of resources.</b>	1.1 Establish criteria against which to assess which agency or group could most effectively address an issue or need.
	1.2 Partner with local municipalities, boards of education, community colleges to provide targeted programming based on gap analysis (Tasks 2.2.2 & 3).
<b>2. Ensure internal coordination of planning, tourism, and economic development support for agri-food.</b>	2.1 Create an internal county staff based review process to coordinate actions and programming between tourism, planning, and economic development at the County.
<b>F. Facilitate links between producers and consumers.</b>	
<b>1. Use past experience and related resources to promote linkages.</b>	1.1 Building on analysis of successes and failures, establish best practices for creating and maintaining linkages throughout the value chain.
<b>2. Support networking by making County resources available to assist in establishing and maintaining linkages.</b>	2.1 Based on established best practices, allocate resources to incubate independent networking services that will become self-sustaining.



**APPENDIX 1**

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**Agricultural Sector Profile (1a)**  
**Agricultural Food Sector Stats Analyst (1b)**

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## Agricultural Sector Profile (Stats Can data)

**Figure 1** - Grey County – Number of Farms, 2006 & 2011

**Figure 2** - Grey County, Farmland Area (Acres), 2006 & 2011

**Figure 3** - Ontario and Grey County, Percentage of Farmland Area, Owned & Rented, 2011

**Figure 4** - Ontario and Grey County, Average Farm Size (Acres), 2006 & 2011

**Figure 5a** – Comparison Chart of SIC Classifications (Historical) to NAICS Codes (2011 Categories)

**Figure 5b** – Comparison Chart of SIC Classifications (Historical) to NAICS Codes (2011 Categories) for Miscellaneous Specialty Categories

**Figure 6** - Grey County, Number of Farms by Farm Type, 2006 & 2011

**Figure 7** - Grey County, Number of Farms by Miscellaneous Specialty Farm Type, 2006 & 2011

**Figure 8** - Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold), 2006 & 2011

**Figure 9a** - Ontario and Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold) per Acre (\$), 2006 & 2011

**Figure 9b** – Ontario and Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold) per Acre (\$), 2006 & 2011

**Figure 10** – Grey County, Gross Farm Receipts by Commodity showing Increase/Decrease (\$) and Percentage Change, 2006 & 2011

**Figure 11a** – Grey County, Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11b** – Grey County, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11c** – West Grey, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11d** – Southgate, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11e** – Grey Highlands, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11f** – Chatsworth, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11g** – The Blue Mountains, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11h** – Meaford, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 11i** – Georgian Bluffs, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

**Figure 12a** – Ontario and Grey County, Farm Operating Expenses and Farm Operating Costs per Acre (\$) and Costs per Farm (\$), 2006 & 2011

**Figure 12b** – Ontario and Grey County, Operating Costs per Acre (\$), 2006 & 2011

**Figure 12c** – Ontario and Grey County, Operating Costs per Farm (\$), 2006 & 2011

**Figure 13a** – Ontario and Grey County, Farm Capital (\$), showing Average Farm Capital (\$), 2006 & 2011

**Figure 13b** – Ontario and Grey County, Average Farm Capital (\$), 2006 & 2011

**Figure 14** – Ontario and Grey County, Average Age of Operators, 2006 & 2011

AREAS – Ontario

Grey County

West Grey

Southgate

Grey Highlands

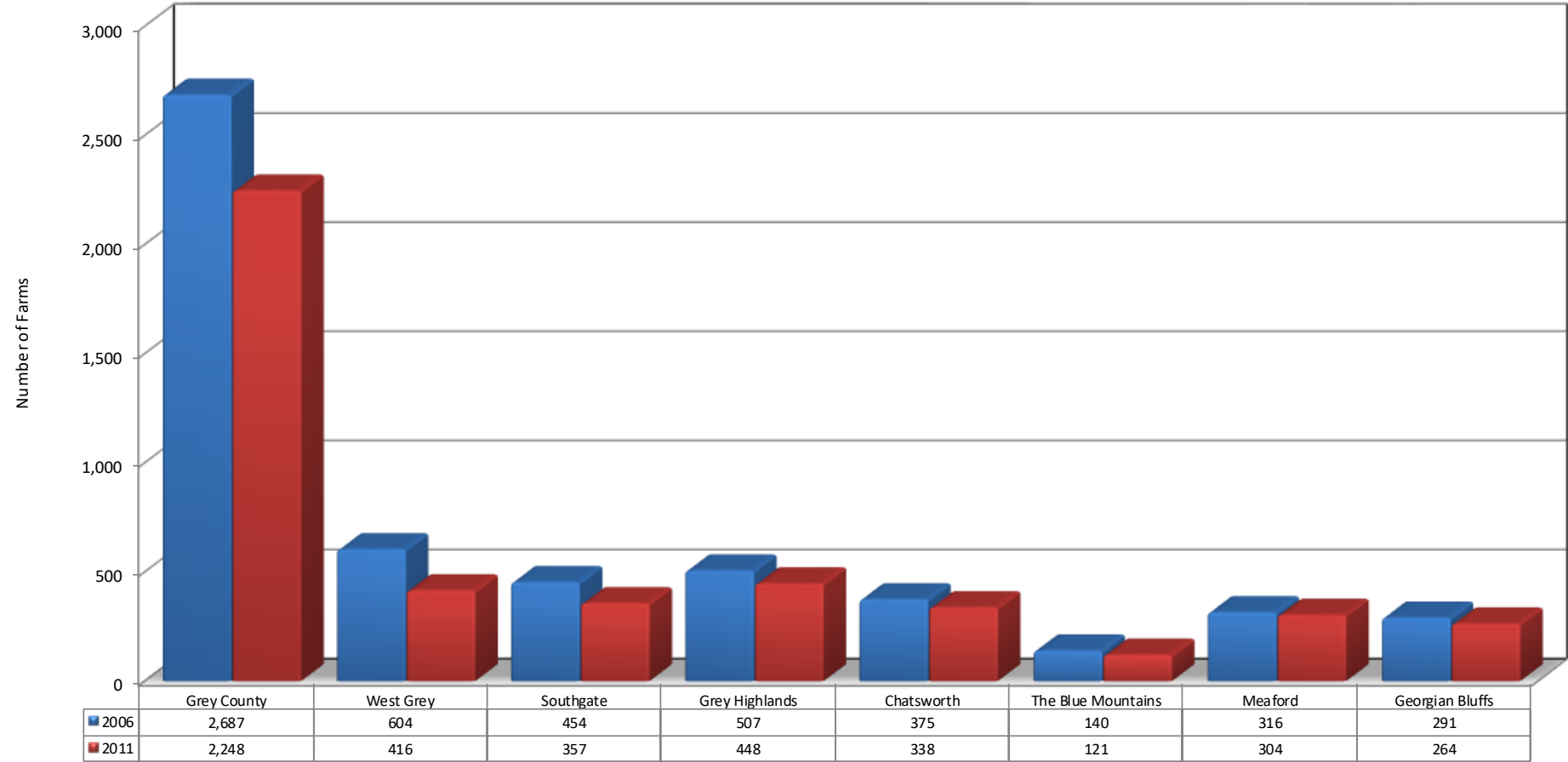
Chatsworth

The Blue Mountains

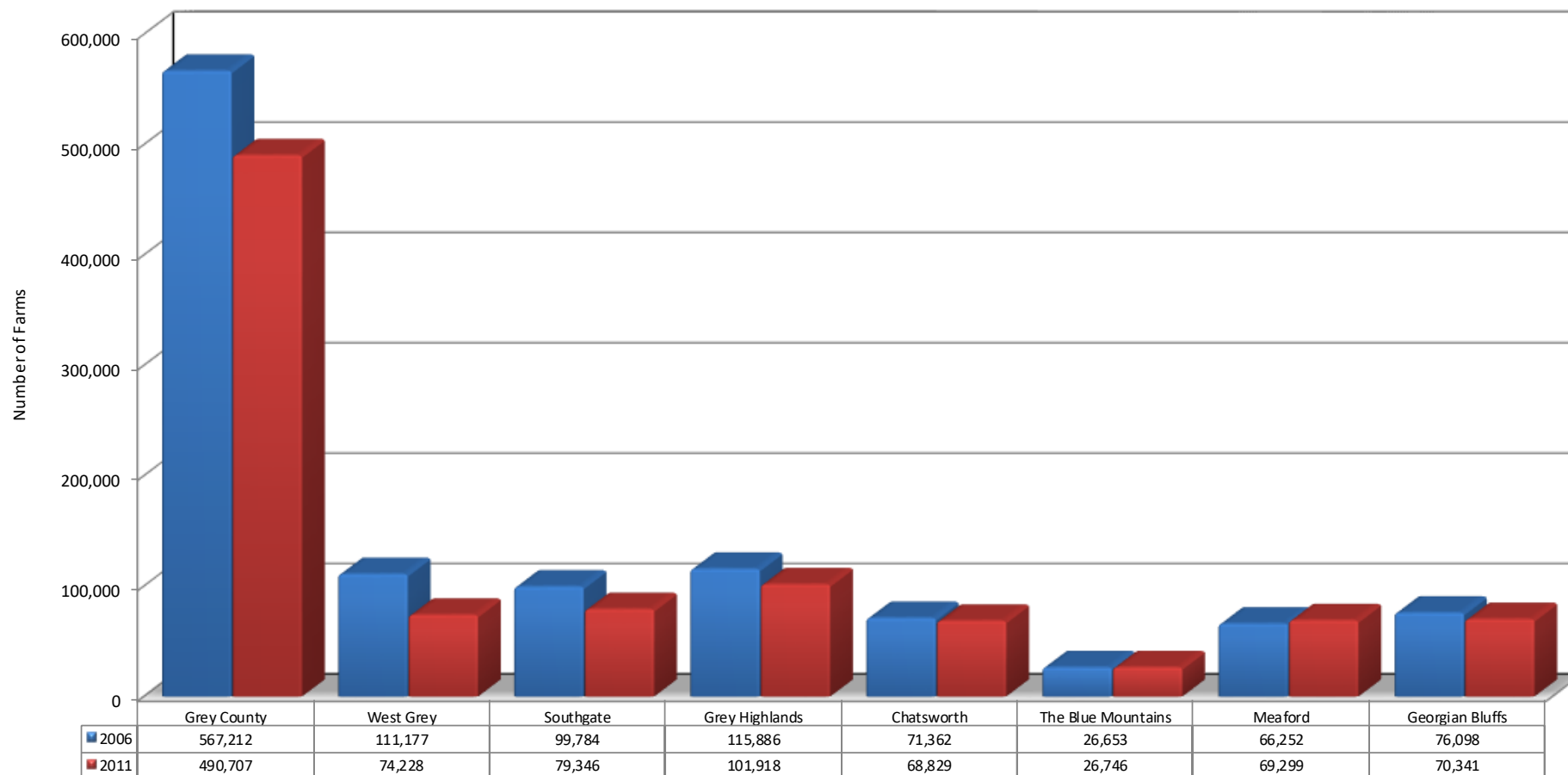
Meaford

Georgian Bluffs

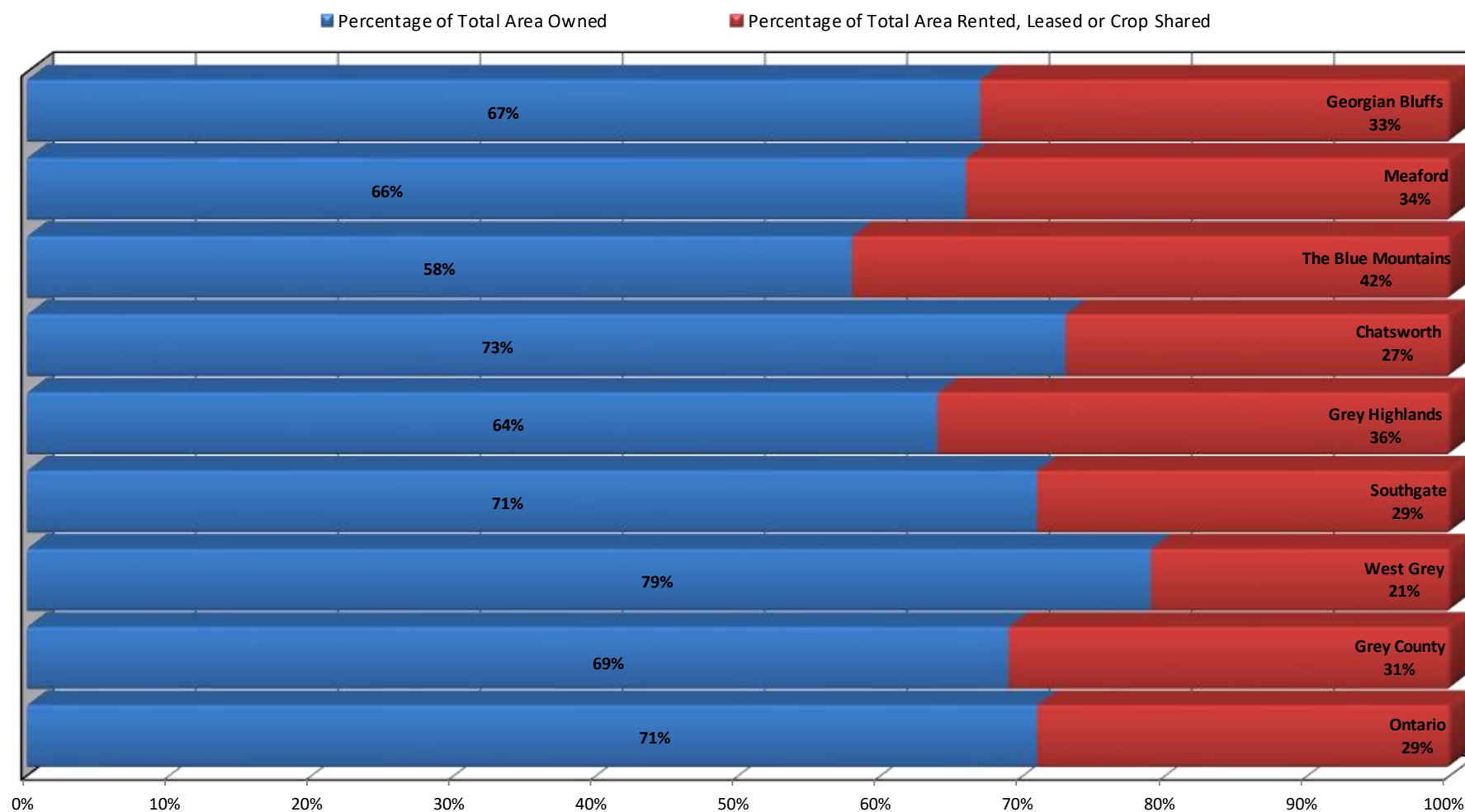
Figure 1 – Grey County – Number of Farms, 2006 & 2011



Source: Statistics Canada, Census of Agriculture, 2006 & 2011

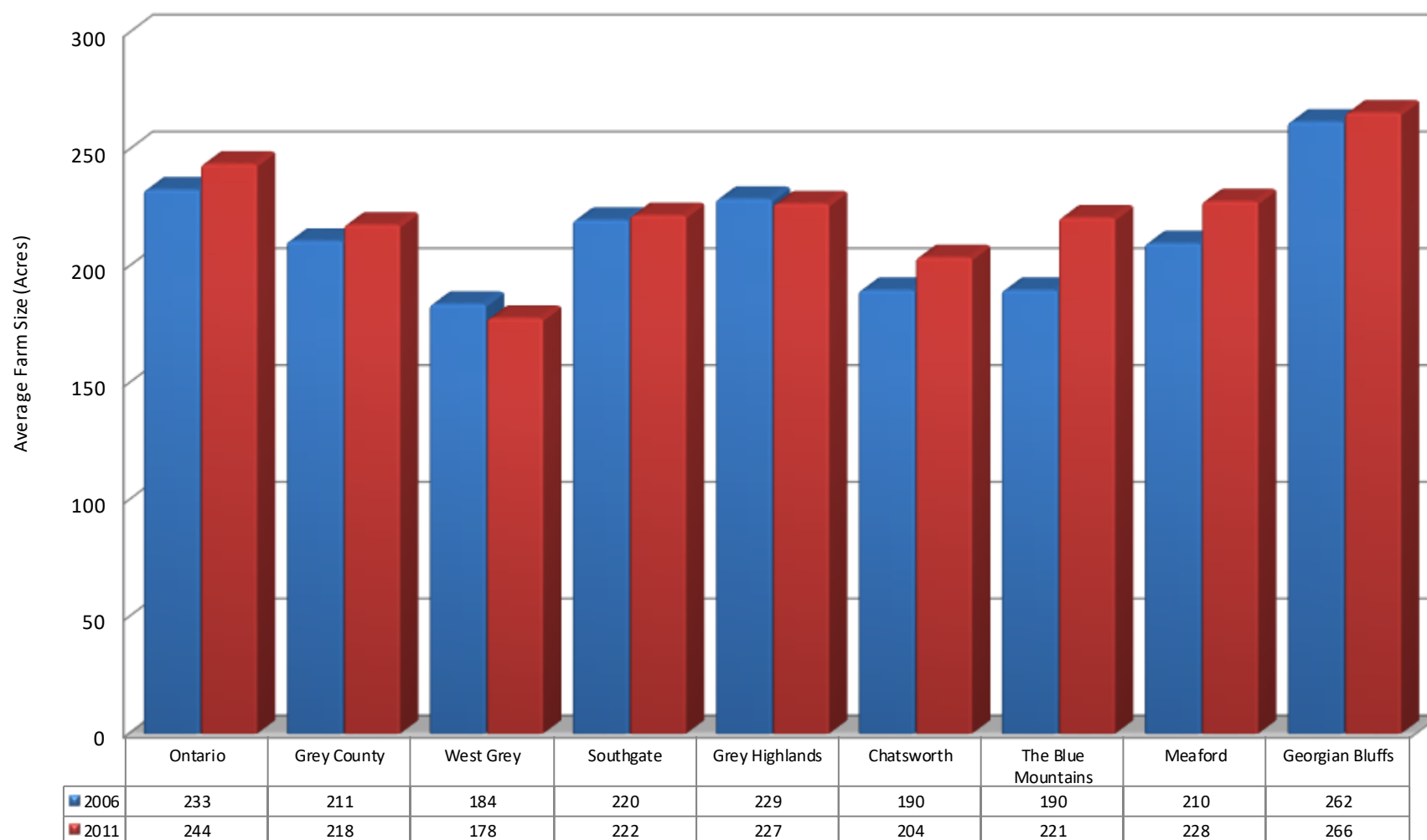
**Figure 2 – Grey County, Farmland Area (Acres), 2006 & 2011**

NOTE: Data for farmland area is calculated on all farms reporting.  
 Source: Statistics Canada, Census of Agriculture, 2006 & 2011

**Figure 3 – Ontario and Grey County, Percentage of Farmland Area, Owned & Rented, 2011**

Source: Statistics Canada, Census of Agriculture, 2006 & 2011

Percentage of Total Area Rented/Leased/Crop Shared is calculated by subtracting Percentage of Total Area Owned from 100  
Total Area Owned and Total Area Rented/Leased/Crop Shared MAY NOT equal Total Area (Acres) due to Suppressions.

**Figure 4** – Ontario and Grey County, Average Farm Size (Acres), 2006 & 2011

NOTE: Data for farmland area is calculated on all farm reporting.  
 Source: Statistics Canada, Census of Agriculture, 2006 & 2011



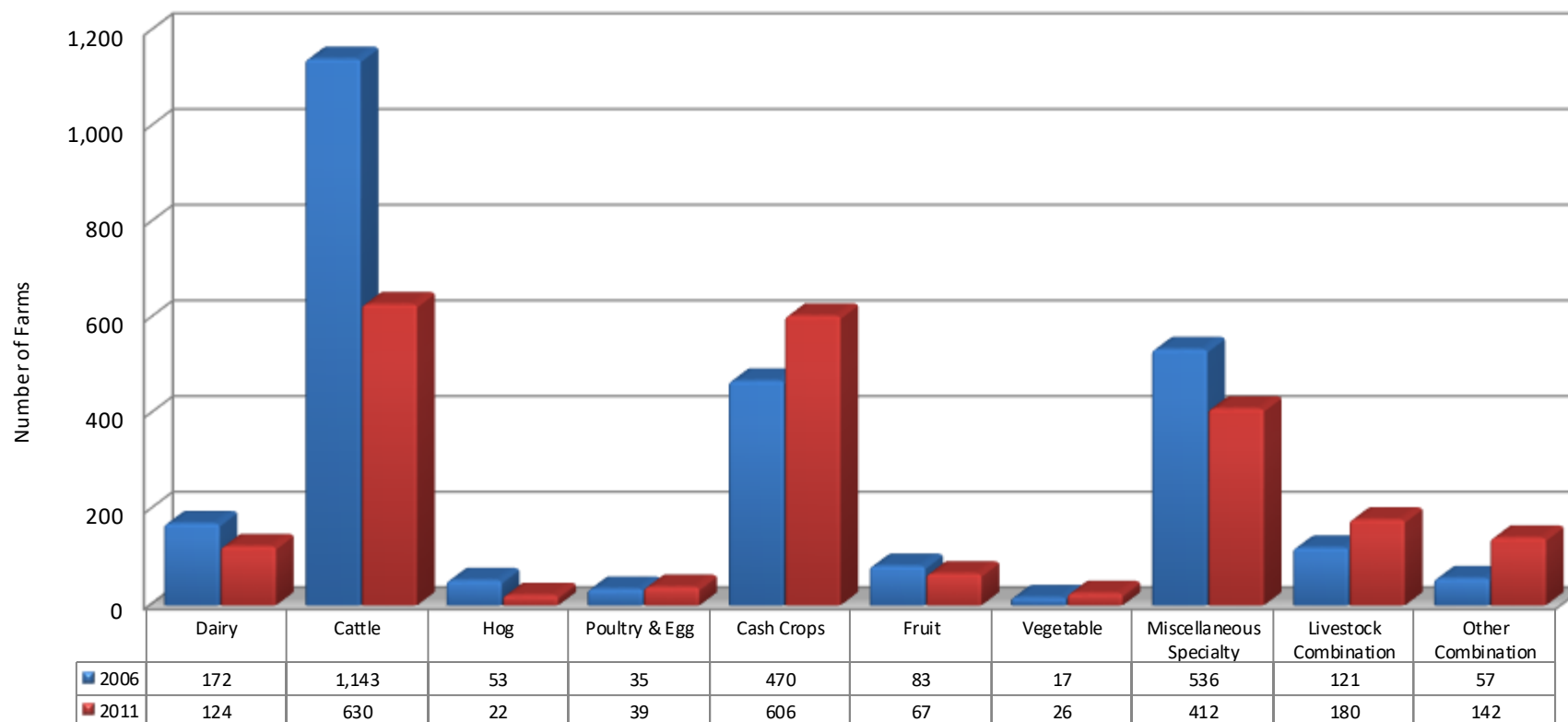
Figure 5a – Comparison Chart of SIC Classifications (Historical) to NAICS Codes (2011 Categories)

SIC CLASSIFICATION (STANDARD INDUSTRIAL CLASSIFICATION) (HISTORICAL)	NAICS CODES (NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM) (2011 CATEGORIES)	ARE SIC CLASSIFICATIONS and NAICS CODES COMPARABLE?
Dairy	Dairy Cattle & Milk Production	Yes
Cattle	Beef Cattle Ranching & Farming (including Feedlots)	Yes
Hog	Hog & Pig Farming	Yes
Poultry & Egg	Chicken Egg Production Broiler & Other Meat-Type Chicken Production Turkey Production Poultry Hatcheries Combination Poultry & Egg Production All Other Poultry Production	Combined All NAICS Code Categories To Be Comparable To Historic SIC Classifications
Wheat *	Wheat Farming *	Combined Into Cash Crops To Be Comparable
Grain & Oilseed *	Soybean Farming * Oilseed (except Soybean) Farming * Corn Farming * Dry Pea & Bean Farming *	Combined Into Cash Crops To Be Comparable
Field Crops *	Hay Farming * Other Grain Farming * Tobacco Farming * Potato Farming *	Combined into Cash Crops To Be Comparable
Fruit	Fruit & Tree Nut Farming	Yes
Miscellaneous Specialty	Sheep Farming Goat Farming Horse & Other Equine Production Fur Bearing Animal & Rabbit Production Apiculture All Other Miscellaneous Animal Production Mushroom Production Other Food Crops Grown Under Cover Floriculture Production Nursery & Tree Production (Includes Christmas Trees) Maple Syrup & Products Production	See Miscellaneous Specialty Breakdown Table
Livestock Combination	Livestock Combination Farming	Yes
Vegetable	Other Vegetable (except Potato) and Melon Farming	Yes
Other Combination	Fruit & Vegetable Combination Farming All Other Miscellaneous Crop Farming	Yes

\* - NOTE: Categories have been combined into "CASH CROPS"

**Figure 5b** – Comparison Chart of SIC Classifications (Historical) to NAICS Codes (2011 Categories) for Miscellaneous Specialty Categories

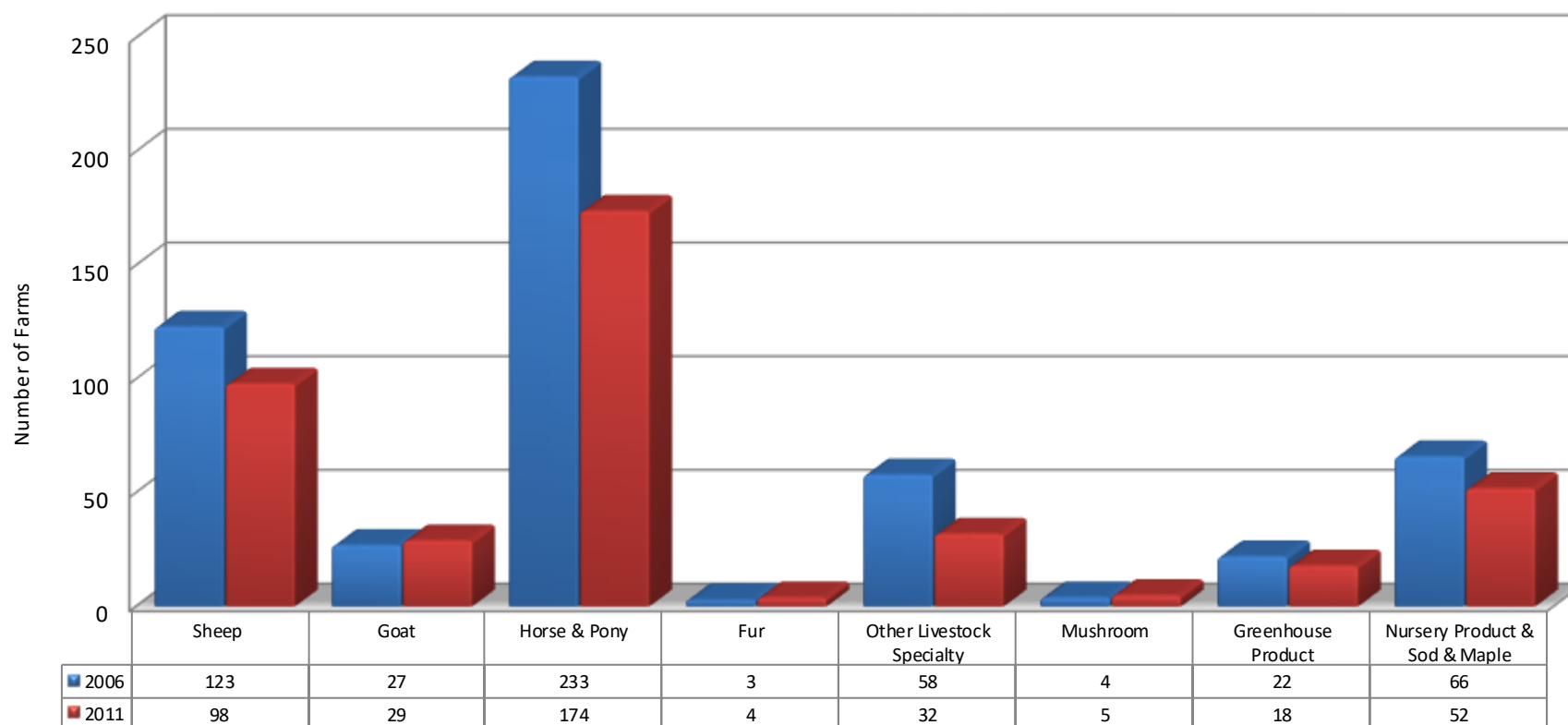
<b>SIC CLASSIFICATION (STANDARD INDUSTRIAL CLASSIFICATION) (HISTORICAL)</b>	<b>NAICS CODES (NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM) (2011 CATEGORIES)</b>	<b>ARE SIC CLASSIFICATIONS and NAICS CODES COMPARABLE?</b>
Sheep & Lamb	Sheep Farming	Yes
Goat	Goat Farming	Yes
Horse & Pony	Horse & Other Equine Production	Yes
Fur	Fur Bearing Animal & Rabbit Production	Yes
Other Livestock Specialty	Apiculture All Other Miscellaneous Animal Production	<i>Combined NAICS Code Categories To Be Comparable To Historic SIC Classifications</i>
Mushroom	Mushroom Production	Yes
Greenhouse Product	Other Crops Grown Under Cover Floriculture Production	<i>Combined NAICS Code Categories To Be Comparable To Historic SIC Classifications</i>
Nursery Product & Sod & Maple	Nursery & Tree Production (includes Christmas Trees) Maple Syrup & Products Production	<i>Combined NAICS Code Categories To Be Comparable To Historic SIC Classifications</i>

**Figure 6 – Grey County, Number of Farms by Farm Type, 2006 & 2011**

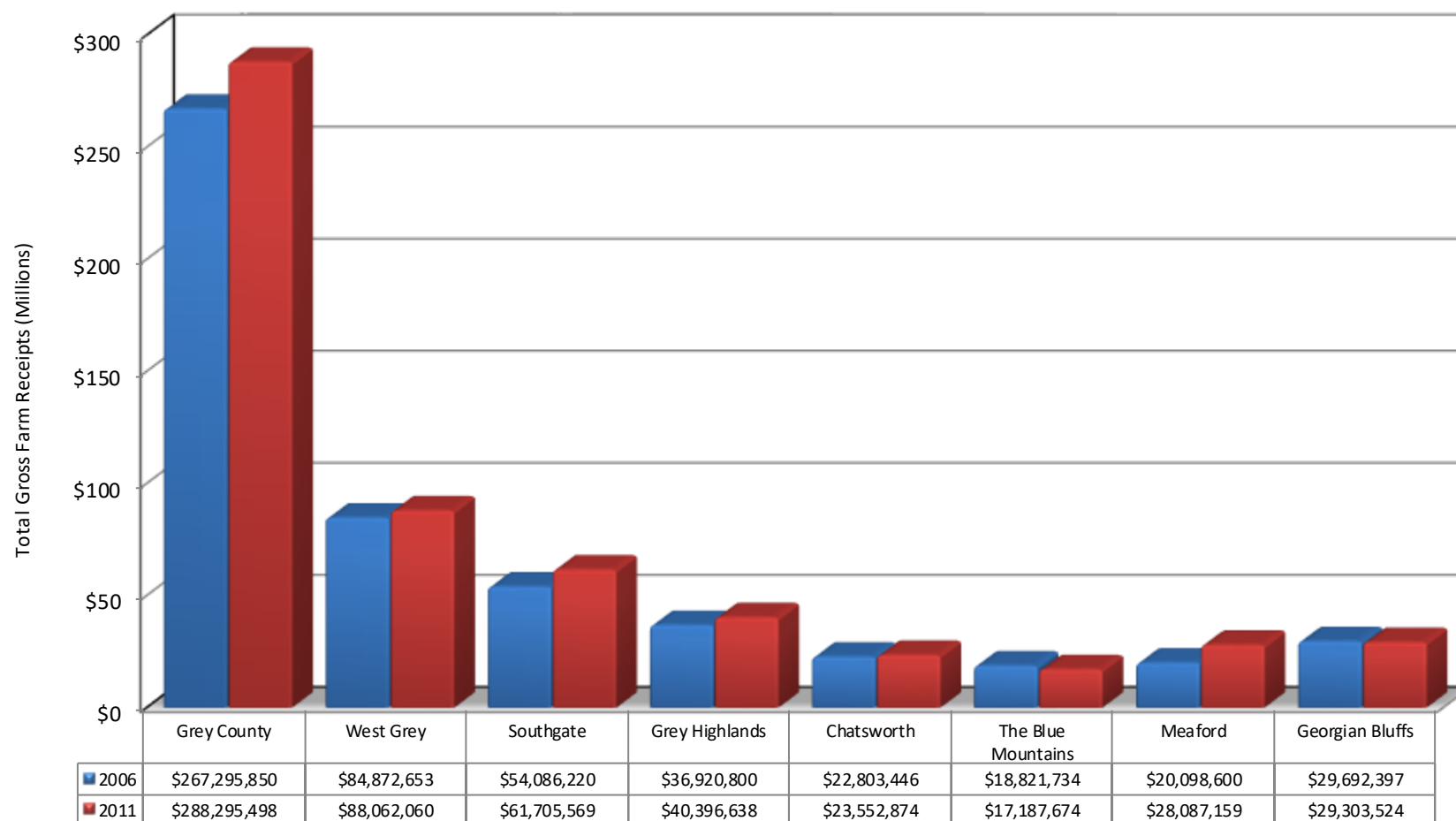
Due to the changes in data collection made by Statistics Canada – The category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops.

Source: Statistics Canada 2006 Number of Farms Classified by Farm Type Classification (SIC Codes);

2011 Number of Farms Classified by Farm Type Classification (NAICS Industry)

**Figure 7 – Grey County, Number of Farms by Miscellaneous Specialty Farm Type, 2006 & 2011**

Source: Statistics Canada 2006 Number of Farms Classified by Farm Type Classification (SIC Codes);  
2011 Number of Farms Classified by Farm Type Classification (NAICS Industry)

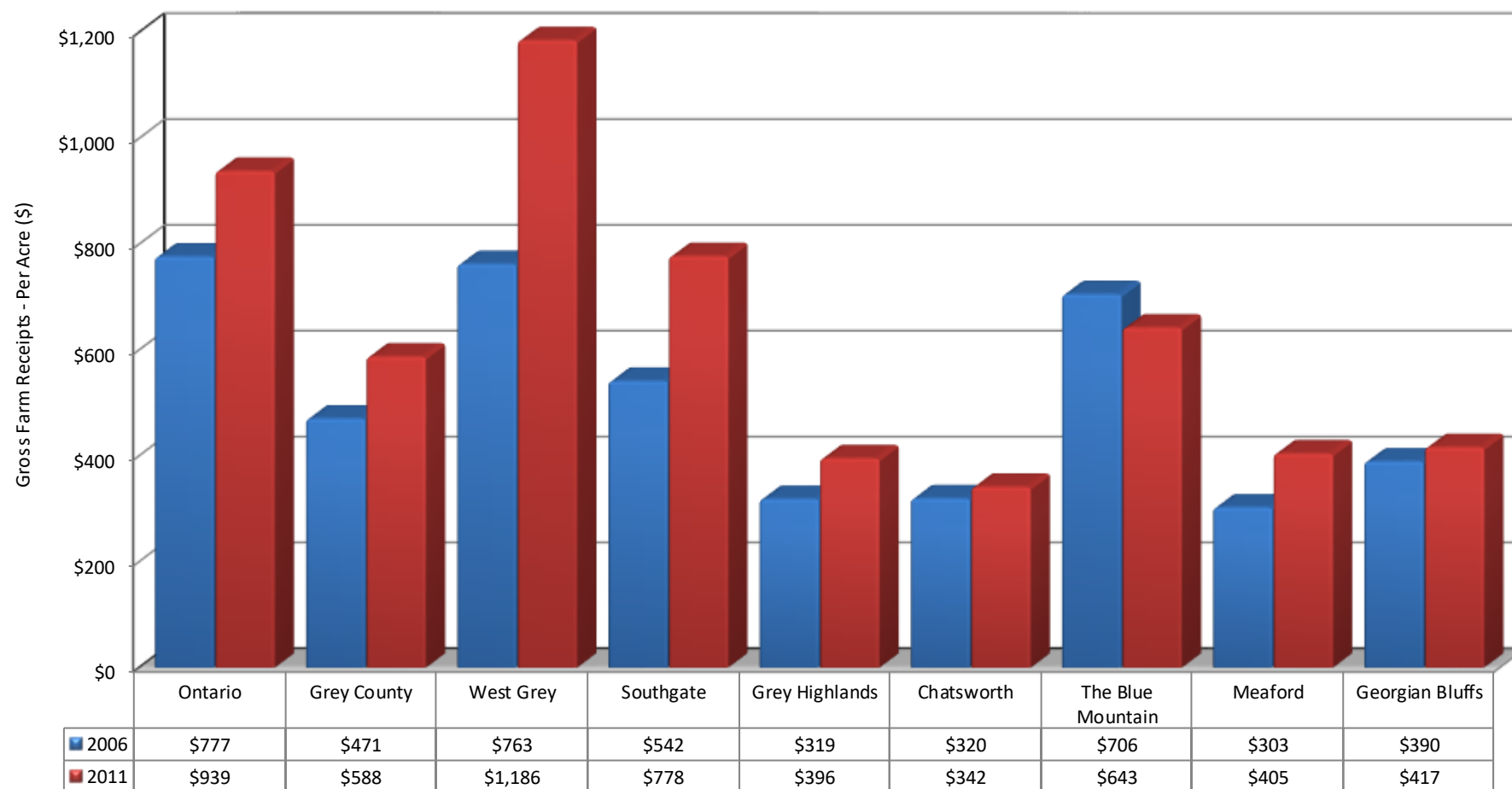
**Figure 8** – Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold), 2006 & 2011

Source: Statistics Canada – 2006 & 2011 Farm Operator Data – 2006 Total Gross Farm Receipts Classified by Farm Type Classification (SIC Codes), 2011 Total Gross Farm Receipts Classified by Farm Type Classification (NAICS Industry)

**Figure 9a – Ontario and Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold) per Acre (\$), 2006 & 2011**

Geographic Location	2006			2011		
	Farmland Area (Acres)	Gross Farm Receipts		Farmland Area (Acres)	Gross Farm Receipts	
		Total (\$)	Per Acre (\$)		Total (\$)	Per Acre (\$)
Ontario	13,310,216	\$10,342,031,229	\$777	12,668,236	\$11,890,835,395	\$939
Grey County	567,212	\$267,295,850	\$471	490,707	\$288,295,498	\$588
West Grey	111,177	\$84,872,653	\$763	74,228	\$88,062,060	\$1,186
Southgate	99,784	\$54,086,220	\$542	79,346	\$61,705,569	\$778
Grey Highlands	115,886	\$36,920,800	\$319	101,918	\$40,396,638	\$396
Chatsworth	71,362	\$22,803,446	\$320	68,829	\$23,552,874	\$342
The Blue Mountains	26,653	\$18,821,734	\$706	26,746	\$17,187,674	\$643
Meaford	66,252	\$20,098,600	\$303	69,299	\$28,087,159	\$405
Georgian Bluffs	76,098	\$29,692,397	\$390	70,341	\$29,303,524	\$417

Source: Statistics Canada – 2006 and 2011 Farm Operator Data – Census of Agriculture – Special Order  
2006 Total Gross Farm Receipts Classified by Farm Type Classification (SIC Codes),  
2011 Total Gross Farm Receipts Classified by Farm Type Classification (NAICS Industry)

**Figure 9b** – Ontario and Grey County, Total Gross Farm Receipts (Excluding Forest Products Sold) per Acre (\$), 2006 & 2011

Source: Statistics Canada – 2006 and 2011 Farm Operator Data – Census of Agriculture – Special Order  
 2006 Total Gross Farm Receipts Classified by Farm Type Classification (SIC Codes),  
 2011 Total Gross Farm Receipts Classified by Farm Type Classification (NAICS Industry)

**Figure 10** – Grey County, Gross Farm Receipts by Commodity showing Increase/Decrease (\$) and Percentage Change, 2006 & 2011

Commodity	Gross Farm Receipts (\$) 2006	Gross Farm Receipts (\$) 2011	Change (\$)	Percentage Change
Dairy	\$42,160,822	\$44,328,006	\$2,167,184	5%
Cattle	\$96,726,244	\$79,773,905	-\$16,952,339	-18%
Hog	\$10,134,922	\$6,502,635	-\$3,632,287	-36%
Poultry & Egg	\$40,348,413	\$23,142,267	-\$17,206,146	-43%
Cash Crops	\$20,127,613	\$37,814,067	\$17,686,454	88%
Fruit	\$16,186,592	\$16,815,115	\$628,523	4%
Miscellaneous Specialty	\$25,292,035	\$14,325,922	-\$10,966,113	-43%
Livestock Combination	\$6,730,213	\$13,037,000	\$6,306,787	94%
Vegetable	\$875,960	x	x	x
Other Combination	\$8,713,036	\$8,663,533	-\$49,503	-1%
TOTAL	\$267,295,850	\$288,295,498	\$20,999,648	

X – Data Suppressed by Statistics Canada to meet Confidentiality

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Due to the changes in Data Collection – there has been a large number of suppression. With the suppressions of data some categories will be significantly undervalued and not comparable.

Due to suppression of data – Gross Farm Receipts by Commodity MAY NOT add up to the Total Gross Farm Receipts for 2006 and 2011

Source: Statistics Canada – 2006 Farm Operator Data – Census of Agriculture – Gross Farm Receipts – Special Order;  
2011 Total Farm Area and Total Gross Farm Receipts Classified by Farm Type Classification (NAICS Industry)



**Figure 11a – Grey County, Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**

Grey County			West Grey			Southgate			Grey Highlands		
Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total
Dairy	\$44,328,006	15.4%	Dairy	\$9,345,011	10.6%	Dairy	\$8,685,254	14.1%	Dairy	\$8,358,065	20.7%
Cattle	\$79,773,905	27.7%	Cattle	\$7,656,344	8.7%	Cattle	\$29,516,297	47.8%	Cattle	\$14,423,846	35.7%
Hog	\$6,502,635	2.3%	Hog	\$2,245,842	2.6%	Hog	x	x	Hog	\$2,158,825	5.3%
Poultry & Egg	\$23,142,267	8.0%	Poultry & Egg	\$15,227,369	17.3%	Poultry & Egg	x	x	Poultry & Egg	x	x
Cash Crops	\$37,814,067	13.1%	Cash Crops	\$6,059,603	6.9%	Cash Crops	\$6,922,187	11.2%	Cash Crops	\$5,937,193	14.7%
Fruit	\$16,815,115	5.8%	Fruit	x	x	Fruit	x	x	Fruit	x	x
Sheep	\$3,438,725	1.2%	Sheep	\$1,177,112	1.3%	Sheep	\$829,628	1.3%	Sheep	\$383,466	0.9%
Goat	\$1,474,112	0.5%	Goat	\$404,510	0.5%	Goat	x	x	Goat	x	x
Horse & Pony	\$7,165,665	2.5%	Horse & Pony	\$1,406,575	1.6%	Horse & Pony	\$657,518	1.1%	Horse & Pony	\$756,708	1.9%
Fur	x	x	Fur	x	x	Fur	x	x	Fur	x	x
Other Livestock Specialty	\$133,855	0.0%	Other Livestock Specialty	\$103,004	0.1%	Other Livestock Specialty	x	x	Other Livestock Specialty	\$111,126	0.3%
Mushroom	x	x	Mushroom	x	x	Mushroom	\$0	0.0%	Mushroom	x	x
Greenhouse Product	\$2,113,565	0.7%	Greenhouse Product	x	x	Greenhouse Product	x	x	Greenhouse Product	x	x
Nursery Product & Sod & Maple	x	x	Nursery Product & Sod & Maple	\$116,598	0.1%	Nursery Product & Sod & Maple	\$125,367	0.2%	Nursery Product & Sod & Maple	\$22,450	0.1%
Livestock Combination	\$13,037,000	4.5%	Livestock Combination	\$1,161,766	1.3%	Livestock Combination	\$6,733,859	10.9%	Livestock Combination	\$2,823,977	7.0%
Vegetable	x	x	Vegetable	x	x	Vegetable	x	x	Vegetable	\$19,839	0.0%
Other Combination	\$8,663,533	3.0%	Other Combination	\$1,259,220	1.4%	Other Combination	\$1,076,107	1.7%	Other Combination	\$1,457,646	3.6%
TOTAL	\$288,295,498		TOTAL	\$88,062,060		TOTAL	\$61,705,569		TOTAL	\$40,396,638	

Chatsworth			The Blue Mountains			Meaford			Georgain Bluffs		
Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total	Commodity	Gross Farm Receipts (\$)	Percentage of Total
Dairy	x	x	Dairy	x	x	Dairy	\$6,910,525	24.6%	Dairy	\$5,531,052	18.9%
Cattle	\$6,140,628	26.1%	Cattle	\$547,122	3.2%	Cattle	\$7,206,336	25.7%	Cattle	\$14,283,332	48.7%
Hog	x	x	Hog	\$0	0.0%	Hog	\$0	0.0%	Hog	x	x
Poultry & Egg	x	x	Poultry & Egg	\$0	0.0%	Poultry & Egg	x	x	Poultry & Egg	x	x
Cash Crops	\$5,679,081	24.1%	Cash Crops	\$3,060,284	17.8%	Cash Crops	\$1,636,115	5.8%	Cash Crops	\$716,732	2.4%
Fruit	x	x	Fruit	\$10,983,287	63.9%	Fruit	\$5,070,341	18.1%	Fruit	x	x
Sheep	\$252,918	1.1%	Sheep	\$100,346	0.6%	Sheep	\$187,143	0.7%	Sheep	\$508,112	1.7%
Goat	\$537,605	2.3%	Goat	\$0	0.0%	Goat	x	x	Goat	\$0	0.0%
Horse & Pony	\$11,493,168	48.8%	Horse & Pony	\$516,594	3.0%	Horse & Pony	\$1,864,440	6.6%	Horse & Pony	\$470,662	1.6%
Fur	\$0	0.0%	Fur	\$0	0.0%	Fur	\$0	0.0%	Fur	\$0	0.0%
Other Livestock Specialty	\$199,306	0.8%	Other Livestock Specialty	x	x	Other Livestock Specialty	x	x	Other Livestock Specialty	x	x
Mushroom	x	x	Mushroom	\$0	0.0%	Mushroom	x	x	Mushroom	x	x
Greenhouse Product	x	x	Greenhouse Product	\$0	0.0%	Greenhouse Product	\$195,988	0.7%	Greenhouse Product	\$953,369	3.3%
Nursery Product & Sod & Maple	x	x	Nursery Product & Sod & Maple	\$72,252	0.4%	Nursery Product & Sod & Maple	\$20,277	0.1%	Nursery Product & Sod & Maple	\$62,040	0.2%
Livestock Combination	\$1,334,341	5.7%	Livestock Combination	\$54,470	0.3%	Livestock Combination	\$643,854	2.3%	Livestock Combination	\$284,733	1.0%
Vegetable	x	x	Vegetable	x	x	Vegetable	\$101,123	0.4%	Vegetable	\$11,444	0.0%
Other Combination	\$964,250	4.1%	Other Combination	\$626,022	3.6%	Other Combination	\$2,063,775	7.3%	Other Combination	\$1,154,312	3.9%
TOTAL	\$23,552,874		TOTAL	\$17,187,674		TOTAL	\$28,087,159		TOTAL	\$29,303,524	

X – Data Suppressed by Statistics Canada to meet Confidentiality

0 – Value of 0

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains &amp; Oilseeds and Field Crops

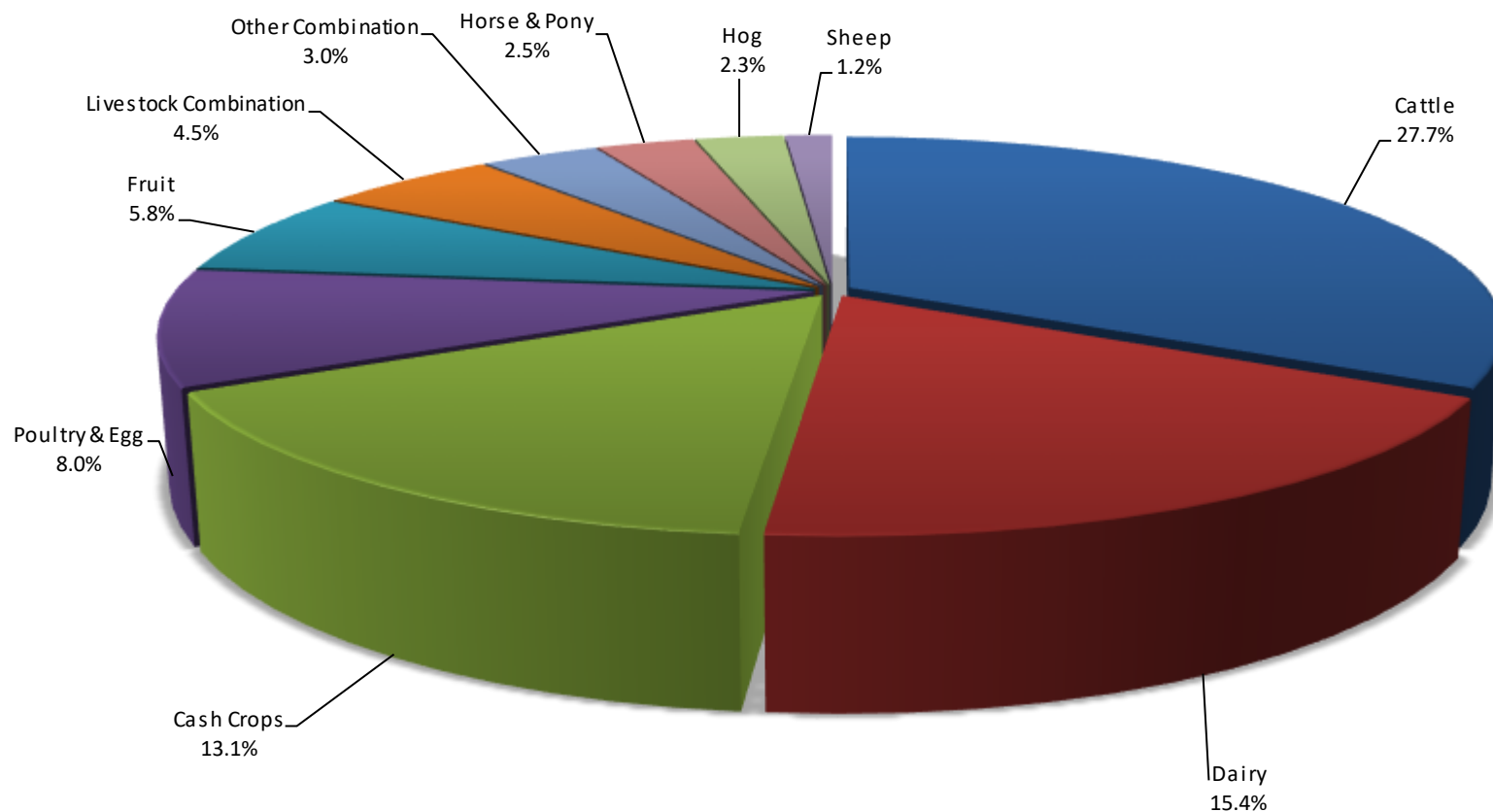
Due to the changes in Data Collection – there has been a large number of suppression. With the suppressions of data some categories will be significantly undervalued and not comparable.

Due to suppression of data – Gross Farm Receipts by Commodity MAY NOT add up to the Total Gross Farm Receipts for 2006 and 2011

Source: Statistics Canada – 2006 Farm Operator Data – Census of Agriculture – Gross Farm Receipts – Special Order;

2011 Total Farm Area and Total Gross Farm Receipts Classified by Farm Type Classification (NAICS Industry)

**Figure 11b** – Grey County, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011

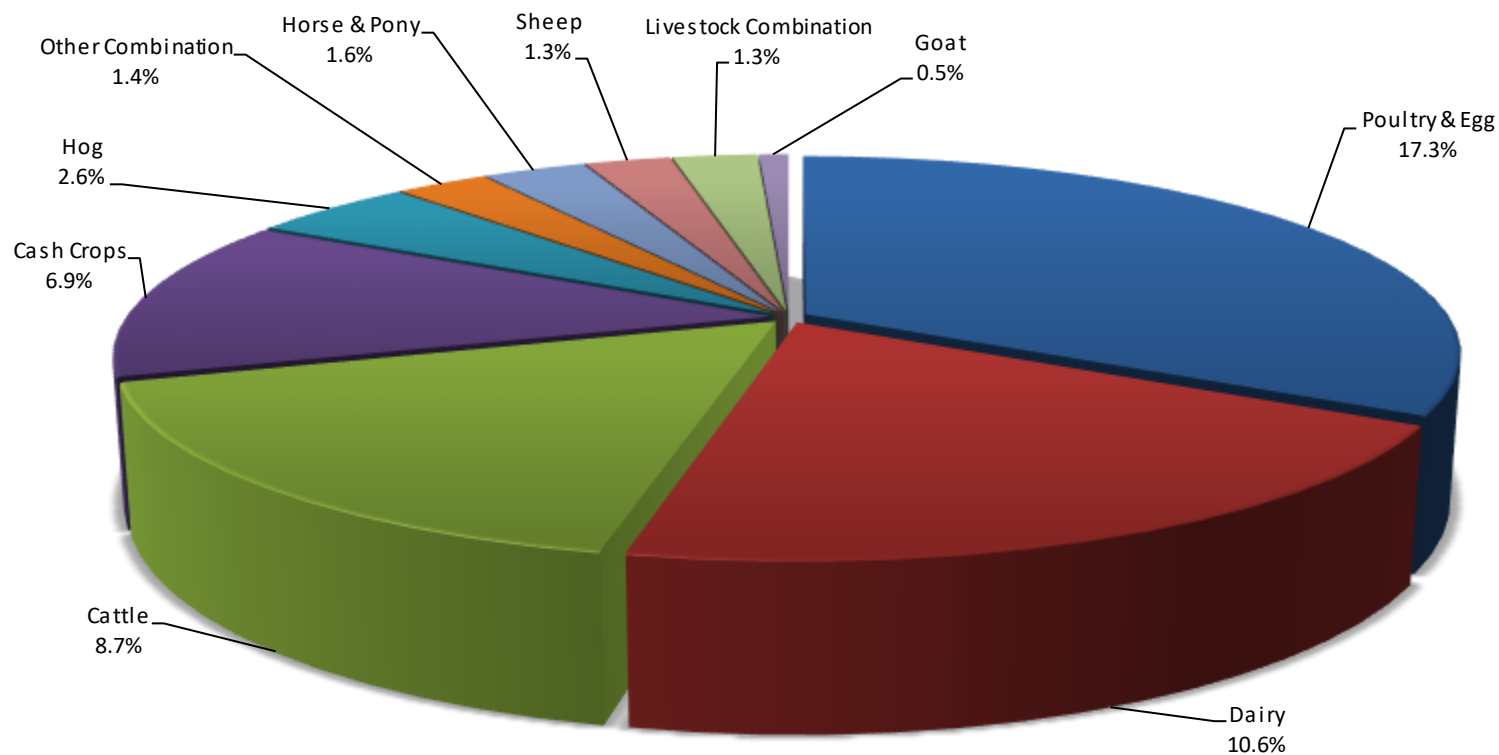


Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11c – West Grey, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**

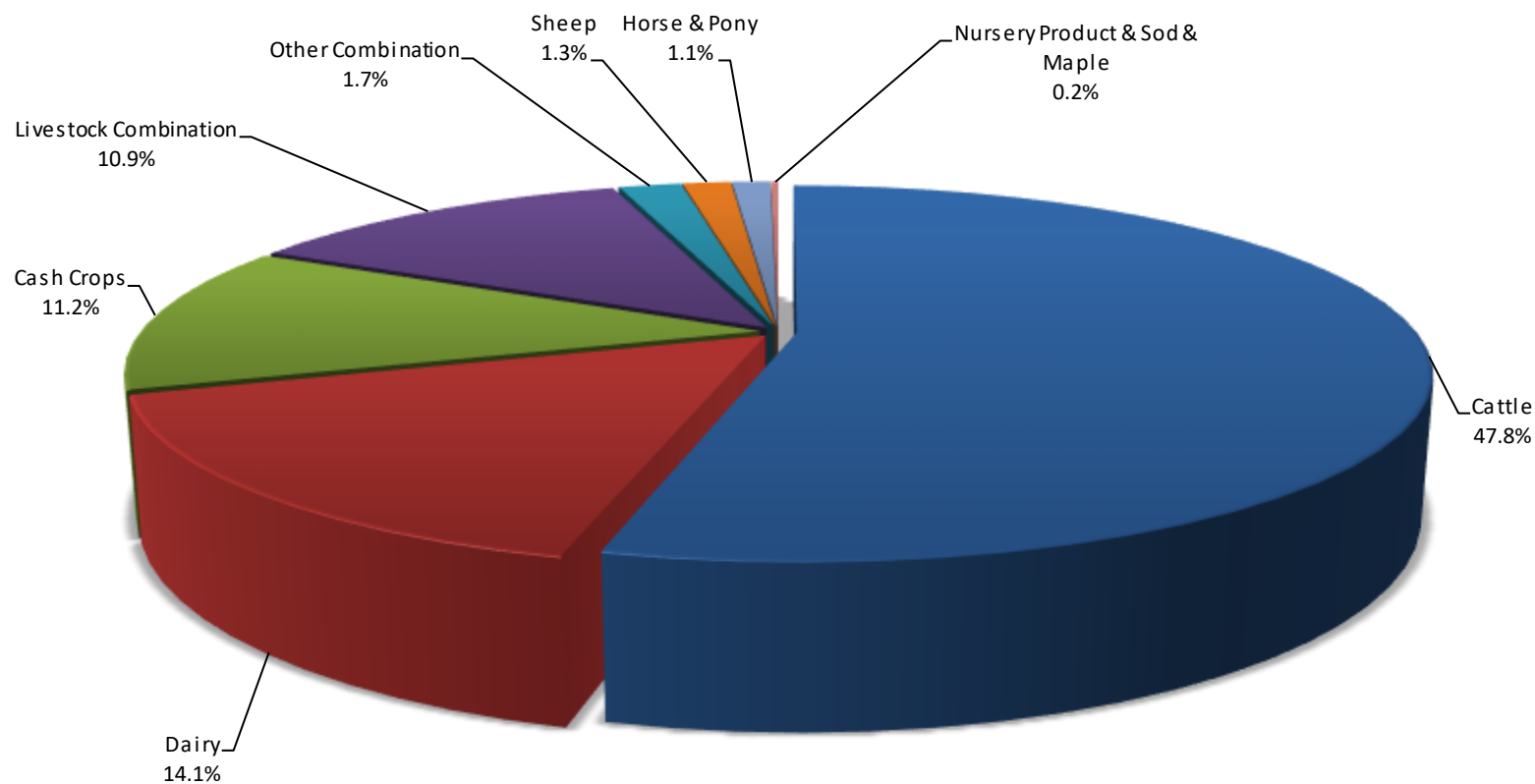


Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Cops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11d – Southgate, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**



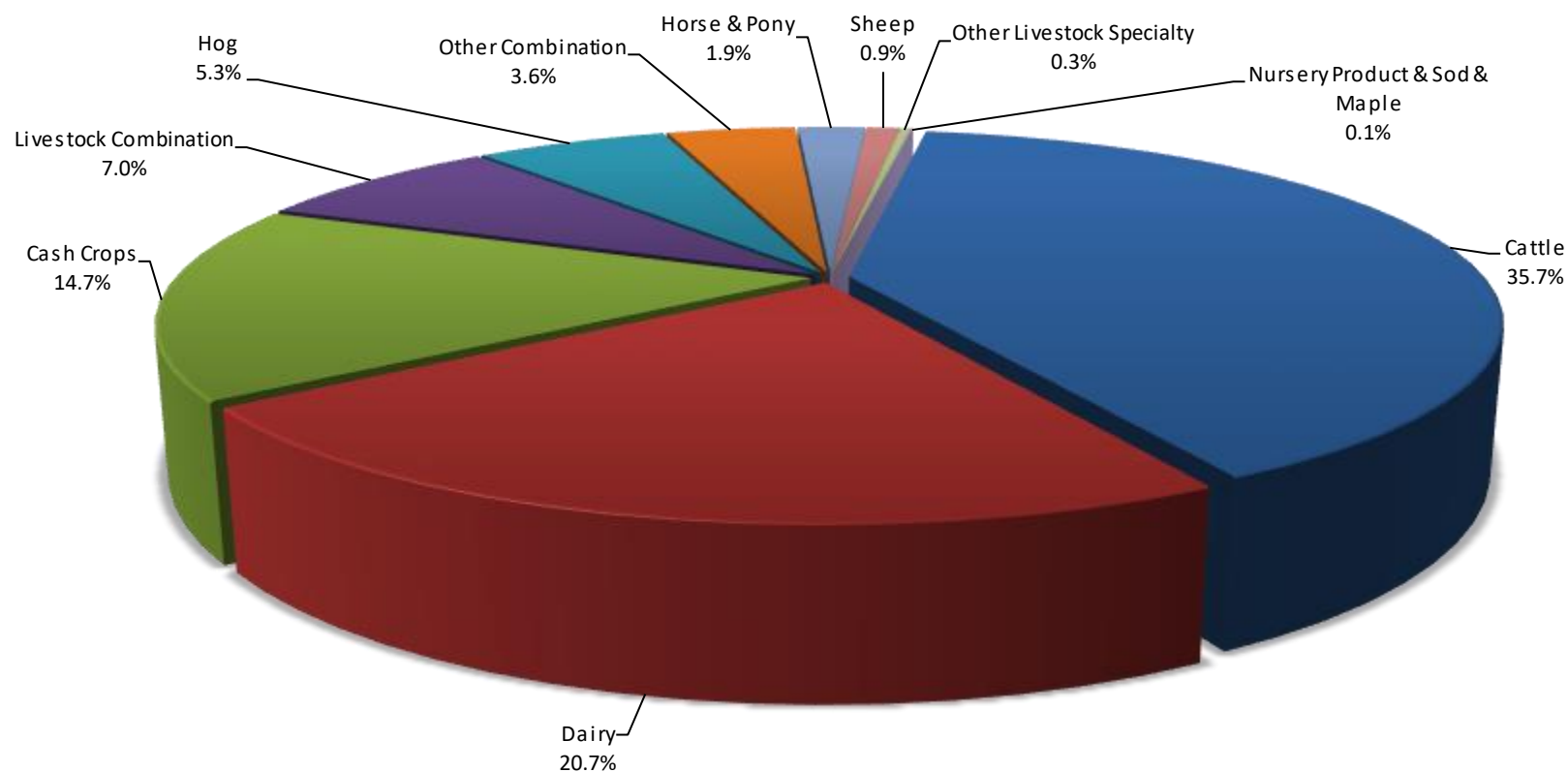
NOTE: Southgate contains Top Eight Ranking – as the remainder are either a zero value or suppressed

Top Eight Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11e – Grey Highlands, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**

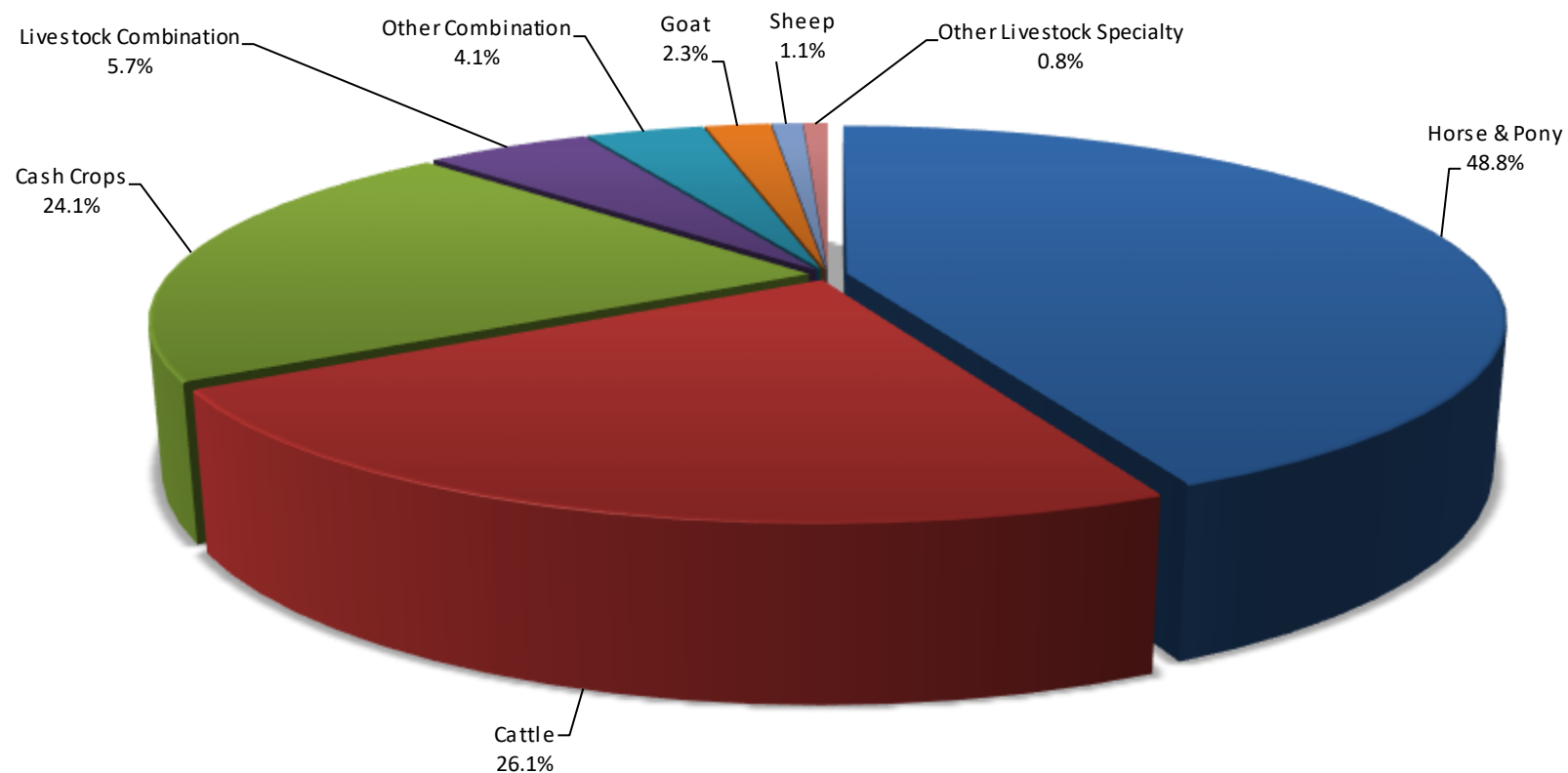


Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11f – Chatsworth, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**



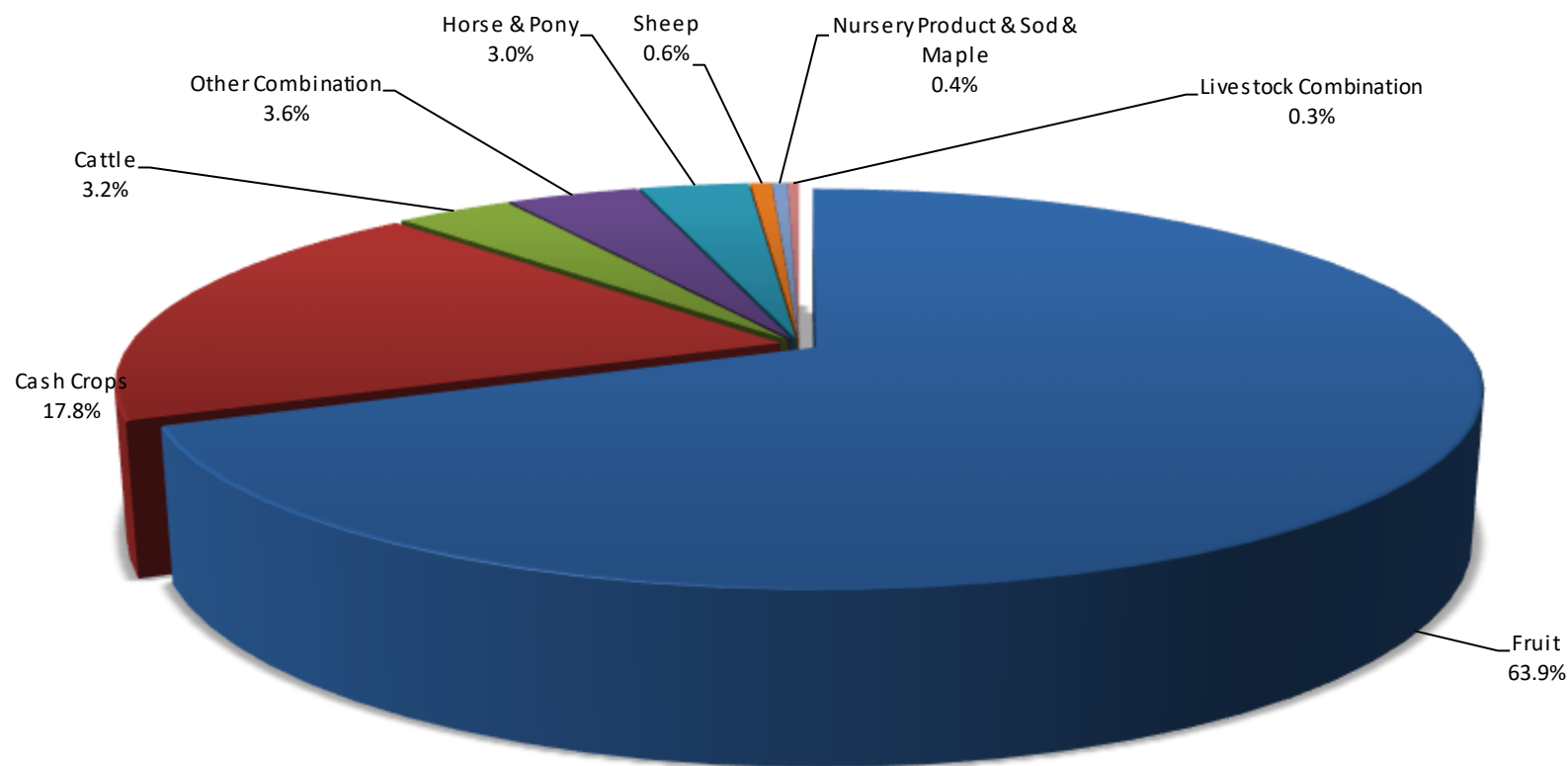
NOTE: Chatsworth contains Top Eight Ranking – as the remainder are either a zero value or suppressed

Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11g** – The Blue Mountains, Top Eight Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011



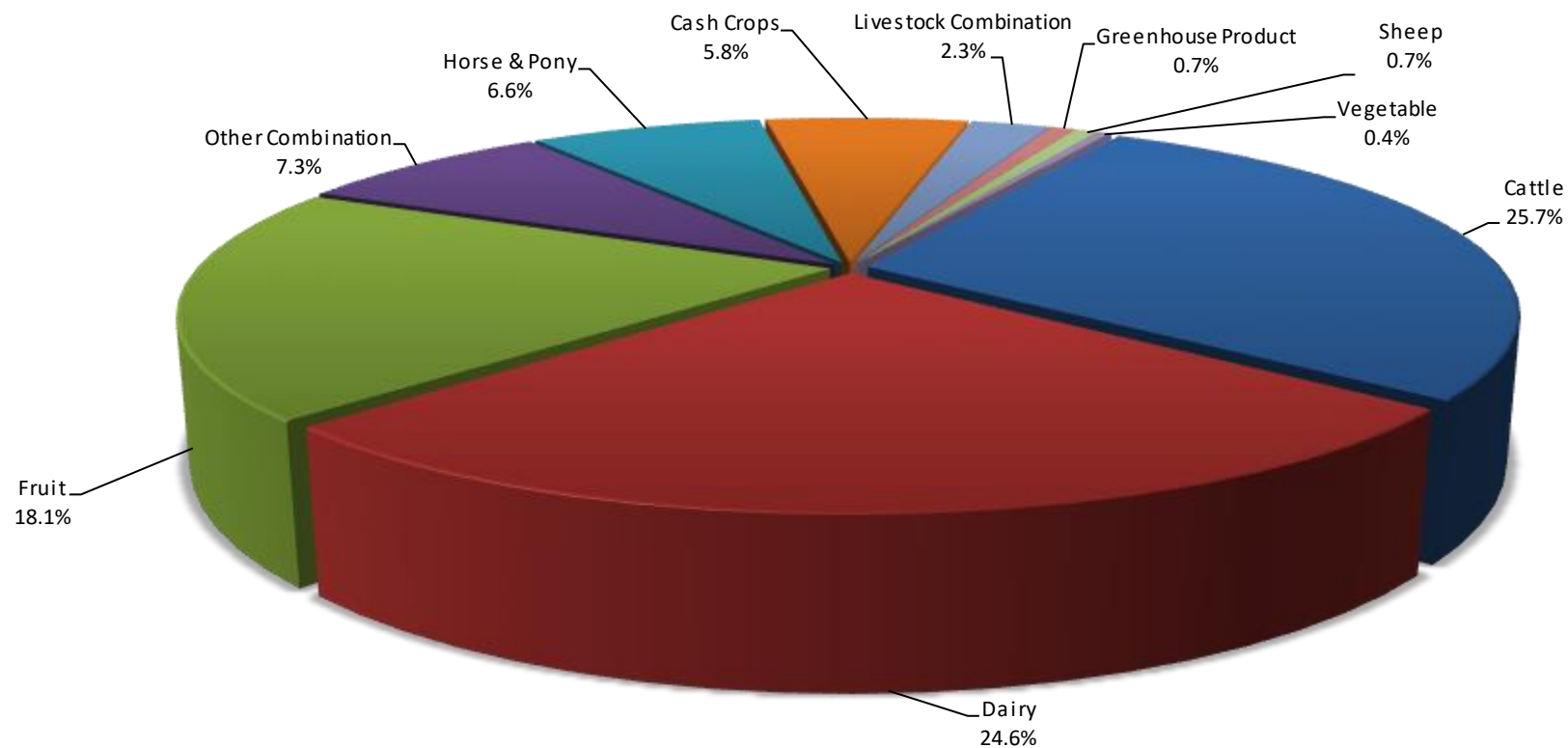
NOTE: The Blue Mountains contains Top Eight Ranking – as the remainder are either a zero value or suppressed

Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Cops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

**Figure 11h – Meaford, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**



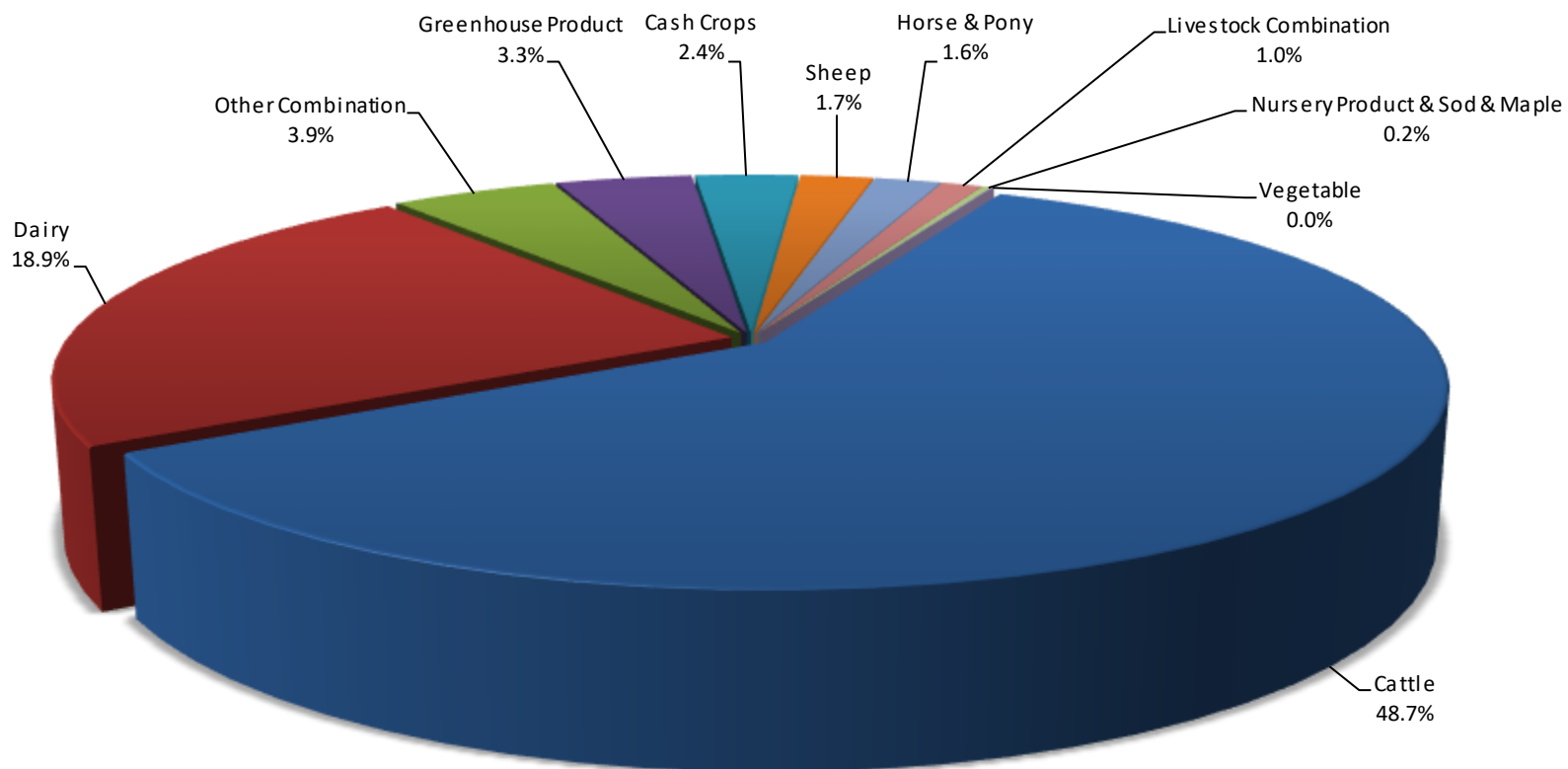
Top Ten Ranking Commodities DO NOT TOTAL 100%

Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order



**Figure 11i – Georgian Bluffs, Top Ten Ranking by Gross Farm Receipts (all Farms), including Breakdown of Miscellaneous Specialty, 2011**



Top Ten Ranking Commodities DO NOT TOTAL 100%

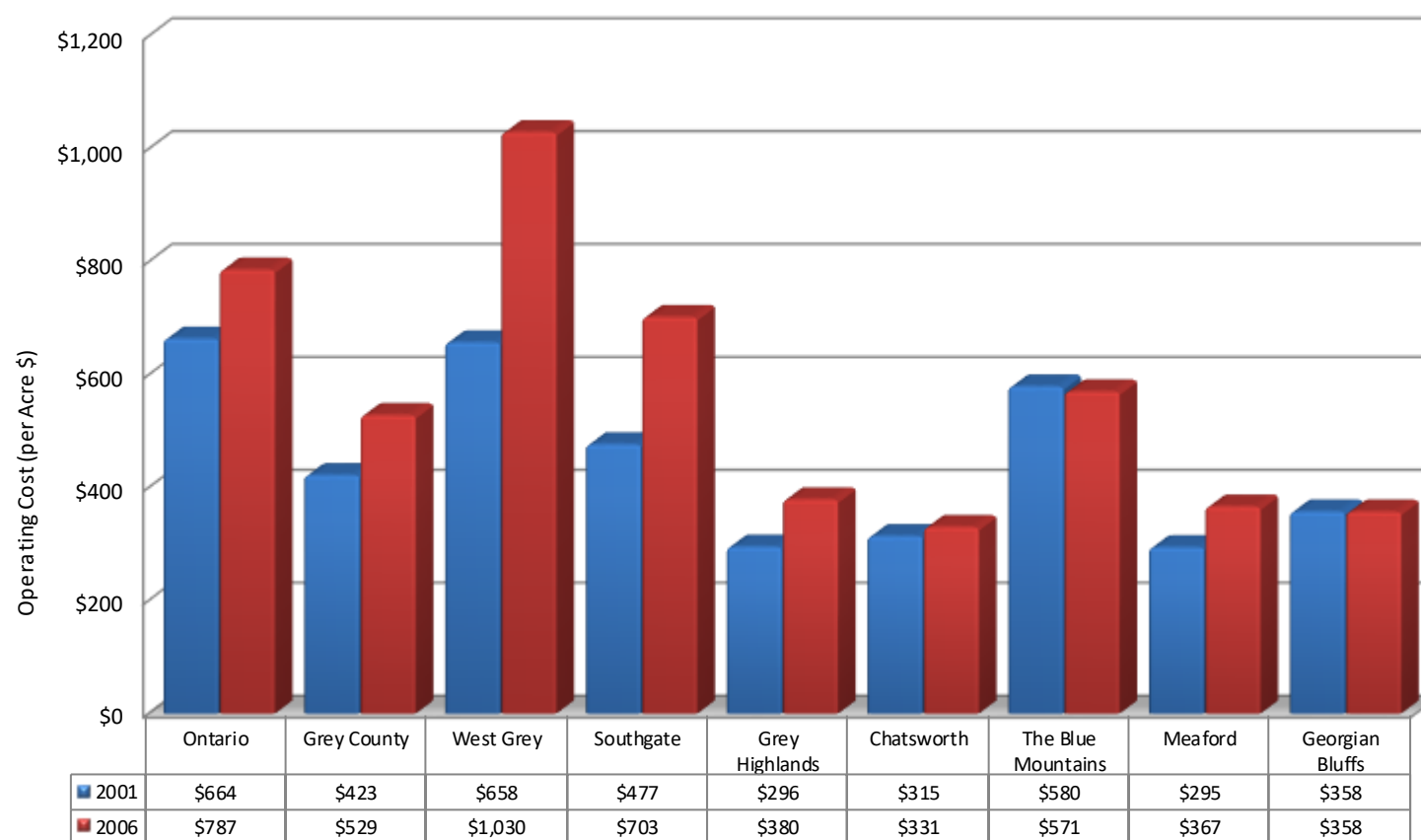
Due to the changes in data collection made by Statistics Canada – The Category of Cash Crops includes the former categories of Wheat, Grains & Oilseeds and Field Crops

Source: Statistics Canada – 2011 Census of Agriculture – Gross Farm Receipts – Special Order

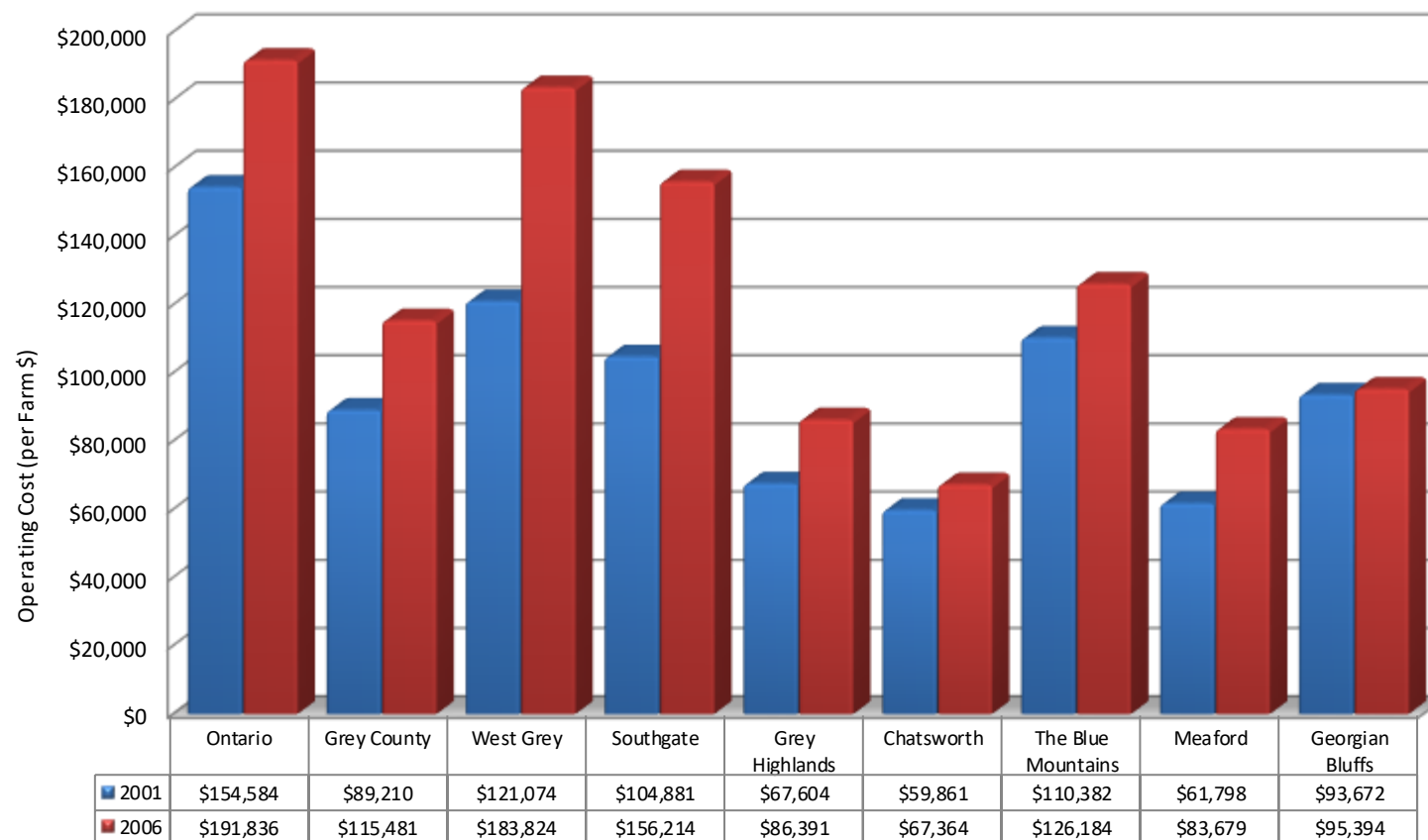
**Figure 12a – Ontario and Grey County, Farm Operating Expenses and Farm Operating Costs per Acre (\$) and Costs per Farm (\$), 2006 & 2011**

Geographic Location	2006					2011				
	Number of Farms	Farmland Acres	Farm Operating Expenses (\$)	Per Acre (\$)	Per Farm (\$)	Number of Farms	Farmland Acres	Farm Operating Expenses (\$)	Per Acre (\$)	Per Farm (\$)
Ontario	57,211	13,310,216	\$8,843,882,426	\$664	\$154,584	51,950	12,668,236	\$9,965,905,445	\$787	\$191,836
Grey County	2,687	567,212	\$239,707,729	\$423	\$89,210	2,248	490,707	\$259,602,175	\$529	\$115,481
West Grey	604	111,177	\$73,128,709	\$658	\$121,074	416	74,228	\$76,470,761	\$1,030	\$183,824
Southgate	454	99,784	\$47,615,976	\$477	\$104,881	357	79,346	\$55,768,524	\$703	\$156,214
Grey Highlands	507	115,886	\$34,275,034	\$296	\$67,604	448	101,918	\$38,703,389	\$380	\$86,391
Chatsworth	375	71,362	\$22,447,927	\$315	\$59,861	338	68,829	\$22,768,909	\$331	\$67,364
The Blue Mountains	140	26,653	\$15,453,413	\$580	\$110,382	121	26,746	\$15,268,253	\$571	\$126,184
Meaford	316	66,252	\$19,528,087	\$295	\$61,798	304	69,299	\$25,438,315	\$367	\$83,679
Georgian Bluffs	291	76,098	\$27,258,583	\$358	\$93,672	264	70,341	\$25,184,024	\$358	\$95,394

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011

**Figure 12b** – Ontario and Grey County, Operating Costs per Acre (\$), 2006 & 2011

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011

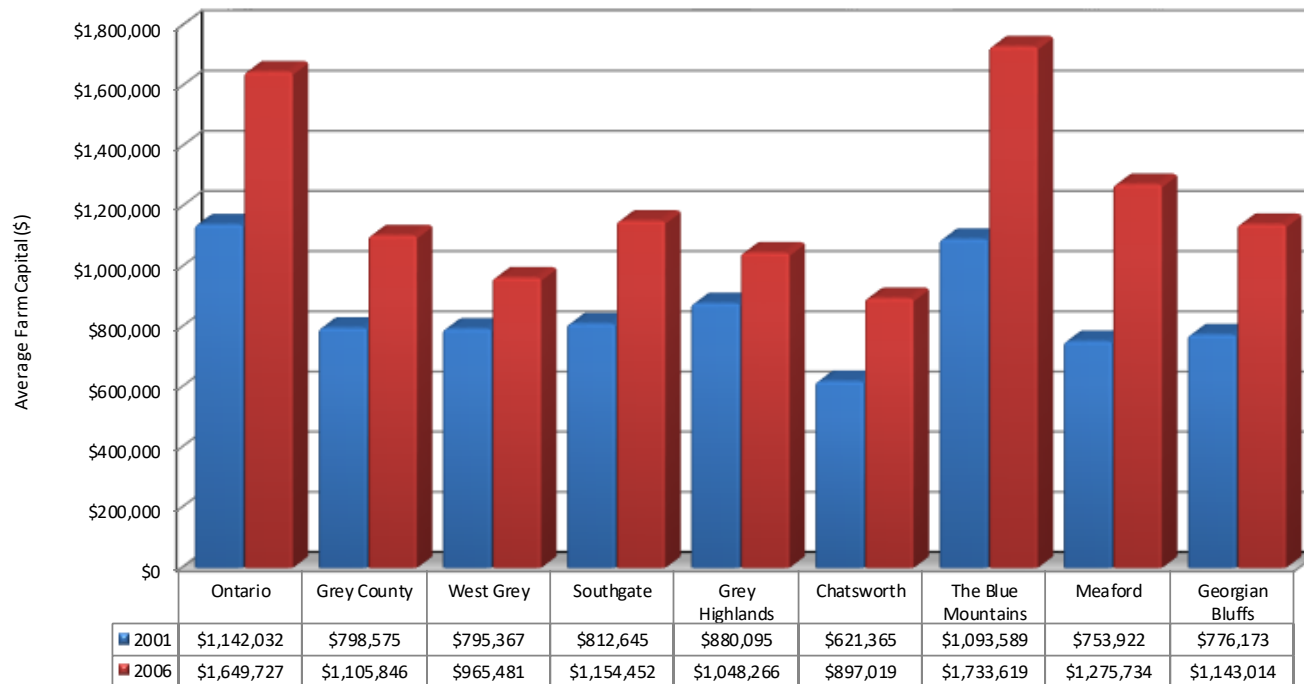
**Figure 12c – Ontario and Grey County, Operating Costs per Farm (\$), 2006 & 2011**

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011

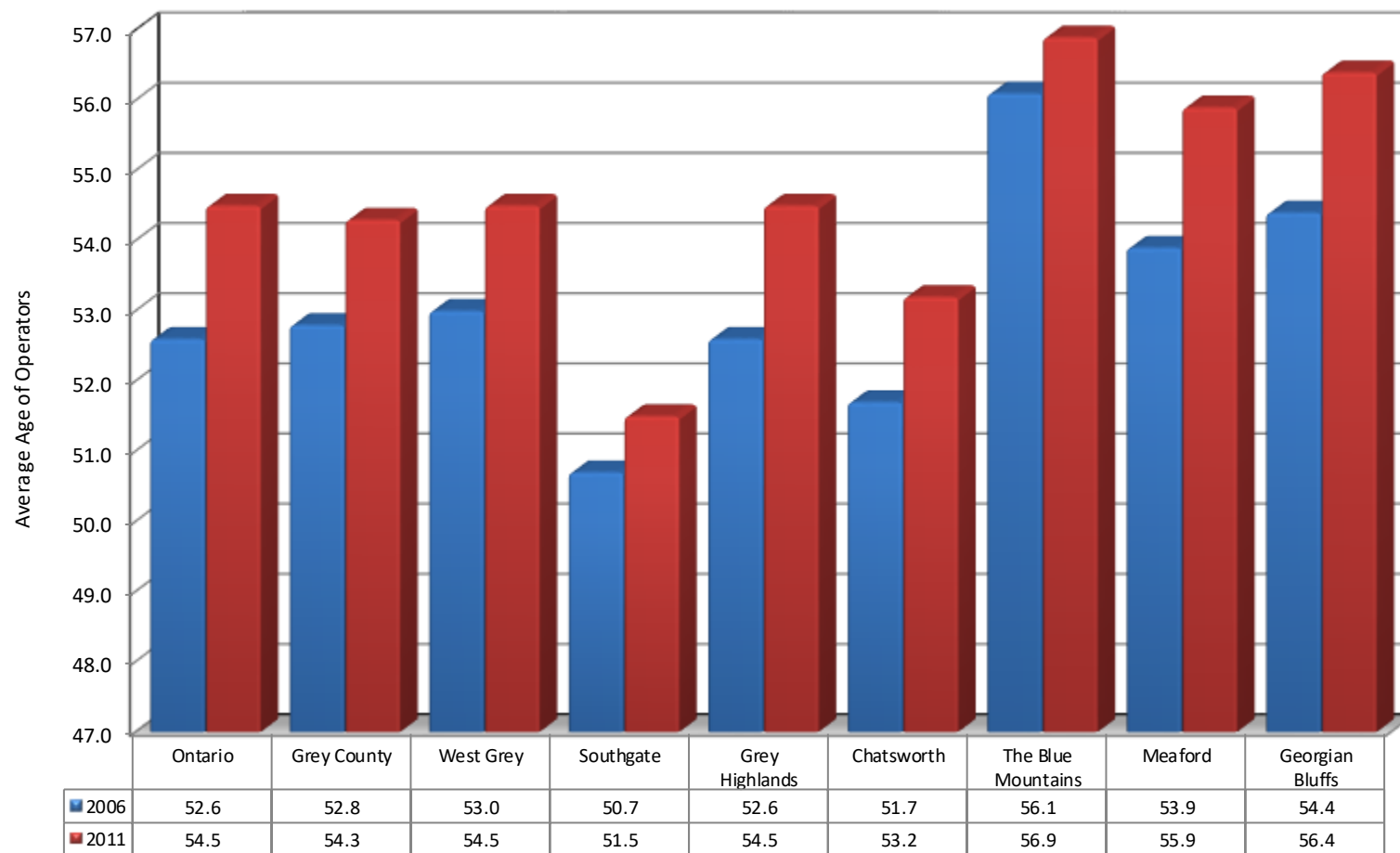
**Figure 13a** – Ontario and Grey County, Farm Capital (\$) showing Average Farm Capital (\$), 2006 & 2011

Geographic Location	2006			2011		
	Number of Farms	Farm Capital	Average Farm Capital (\$)	Number of Farms	Farm Capital	Average Farm Capital (\$)
Ontario	57,211	\$65,336,796,501	\$1,142,032	51,950	\$85,703,337,499	\$1,649,727
Grey County	2,687	\$2,145,770,842	\$798,575	2,248	\$2,485,941,988	\$1,105,846
West Grey	604	\$480,401,662	\$795,367	416	\$401,640,137	\$965,481
Southgate	454	\$368,940,980	\$812,645	357	\$412,139,397	\$1,154,452
Grey Highlands	507	\$446,208,391	\$880,095	448	\$469,623,063	\$1,048,266
Chatsworth	375	\$233,011,787	\$621,365	338	\$303,192,558	\$897,019
The Blue Mountains	140	\$153,102,509	\$1,093,589	121	\$209,767,955	\$1,733,619
Meaford	316	\$238,239,240	\$753,922	304	\$387,823,173	\$1,275,734
Georgian Bluffs	291	\$225,866,273	\$776,173	264	\$301,755,705	\$1,143,014

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011

**Figure 13b** – Ontario and Grey County, Average Farm Capital (\$), 2006 & 2011

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011

**Figure 14** – Ontario and Grey County, Average Age of Operators, 2006 & 2011

Source: Statistics Canada – Census of Agriculture, 2006 &amp; 2011





# Industry Overview

Emsi Q3 2016 Data Set

March 2017

Region of Waterloo



Region of Waterloo

# Parameters

## Industries

22 items selected. See Appendix A for details.

## Regions

Code	Description
3542004	West Grey
3542005	Southgate
3542015	Grey Highlands
3542029	Hanover
3542037	Chatsworth
3542045	The Blue Mountains
3542047	Meaford
3542053	Georgian Bluffs
3542059	Owen Sound
4609017	Grey

## Timeframe

2007 - 2022

## Datarun

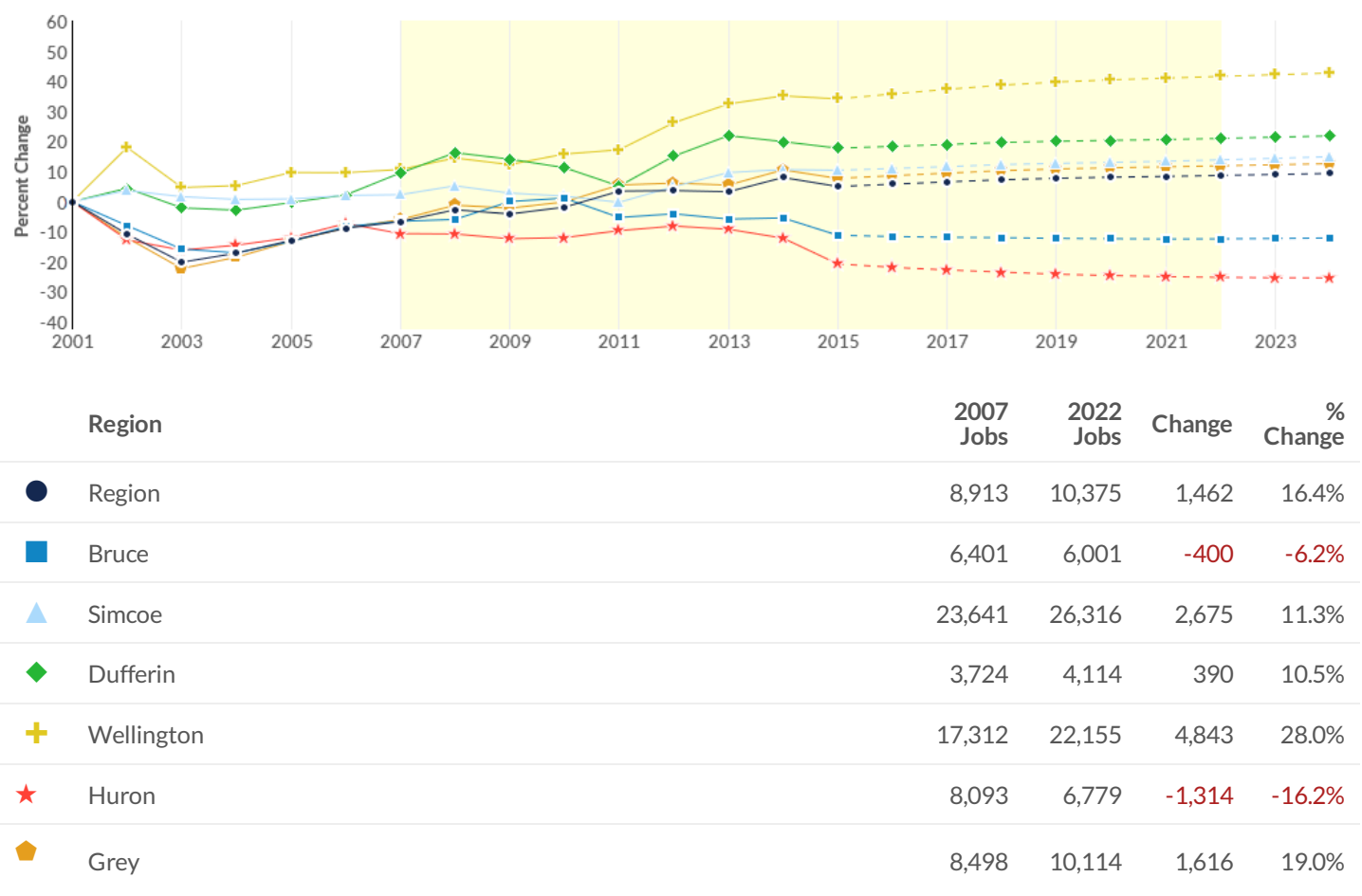
2016.3 – Employees and Self-Employed

# 22 Industries in 10 Census Subdivisions

## Industry Summary for 22 Industries

<div>10,025</div> <div>Jobs (2015)</div> <div>78% above National average</div>	<div>+16.4%</div> <div>% Change (2007-2022)</div> <div>Nation: +11.1%</div>
--	---

## Regional Trends



## Occupations Employed by these Industries

Description	Employed in Industry Group (2015)	% of Total Jobs in Industry Group (2015)
Managers in agriculture	1,899	18.9%
Food counter attendants, kitchen helpers and related support occupations	1,007	10.0%
General farm workers	866	8.6%
Cashiers	829	8.3%
Cooks	620	6.2%

## Industry Requirements

Purchases from	In-region Purchases	Imported Purchases	Total Purchases
Farms	\$140,776,161	\$83,477,832	\$224,253,992
Animal food manufacturing	\$25,172,649	\$10,409,645	\$35,582,295
Meat product manufacturing	\$23,201,647	\$10,025,582	\$33,227,229
Pesticide, fertilizer and other agricultural chemical manufacturing	\$0	\$32,723,488	\$32,723,488
Dairy product manufacturing	\$20,477,817	\$6,874,567	\$27,352,385

# Appendix A - Industries

Code	Description
1110	Farms
1150	Support activities for farms
3111	Animal food manufacturing
3112	Grain and oilseed milling
3113	Sugar and confectionery product manufacturing
3114	Fruit and vegetable preserving and specialty food manufacturing
3115	Dairy product manufacturing
3116	Meat product manufacturing
3118	Bakeries and tortilla manufacturing
3119	Other food manufacturing
3121	Beverage manufacturing
4111	Farm product merchant wholesalers
4131	Food merchant wholesalers
4132	Beverage merchant wholesalers
4171	Farm, lawn and garden machinery and equipment merchant wholesalers
4183	Agricultural supplies merchant wholesalers
4451	Grocery stores
4452	Specialty food stores
4453	Beer, wine and liquor stores
7223	Special food services
7224	Drinking places (alcoholic beverages)
7225	Full-service restaurants and limited-service eating places

# Appendix B - Data Sources and Calculations

## Industry Data

In order to capture a complete picture of industry employment, Emsi combines employment data from Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Census, and Canadian Business Patterns (CBP) to form detailed geographic estimates of employment. Projections are based on the latest available Emsi industry data, 10-year past local trends in each industry and growth rates from national industry projections from the Canadian Occupational Projection System (COPS) produced by Human Resources and Skills Development Canada.

## Staffing Patterns Data

The staffing patterns data in this report is compiled from several sources using a specialized process. Sources include the Labour Force Survey (LFS) and the Census. Emsi uses ratios from the Census and inputs regional jobs by industry, converting these to jobs by occupation. The ratios derived from this are adjusted to equal actual regional data, resulting in a unique regional staffing pattern.

## Input-Output Data

This report contains data from Emsi's Input-Output model. It is based on data from StatCan's National Symmetric Input-Output table, National Household Survey commuting flows, Canadian Business Patterns, and several Emsi in-house data sets.

# Regional Comparison by Occupation

Comparing ag and food 4-digit across 6 Regions

Emsi Q3 2016 Data Set

March 2017

Region of Waterloo



Region of Waterloo

# Parameters

## Occupations

27 items selected. See Appendix A for details.

## Region

Code	Description	Level
3541	Bruce	CD
3543	Simcoe	CD
3522	Dufferin	CD
3523	Wellington	CD
3540	Huron	CD
3542	Grey	CD

## Timeframe

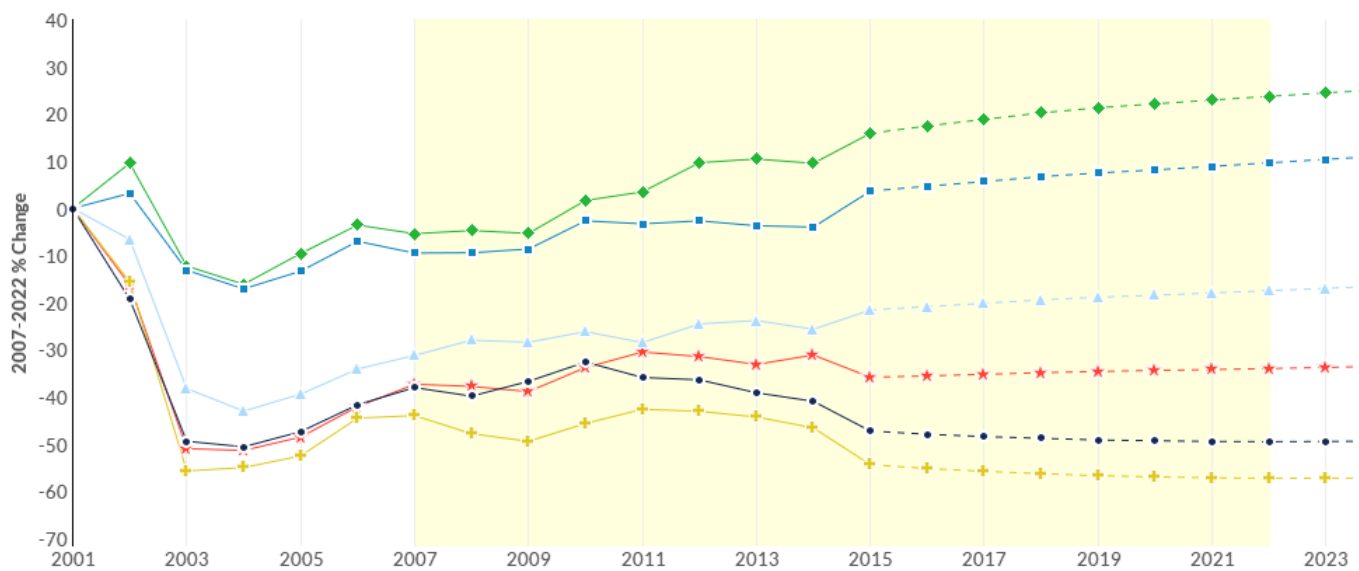
2007 - 2022

## Datarun

2016.3 – Employees and Self-Employed

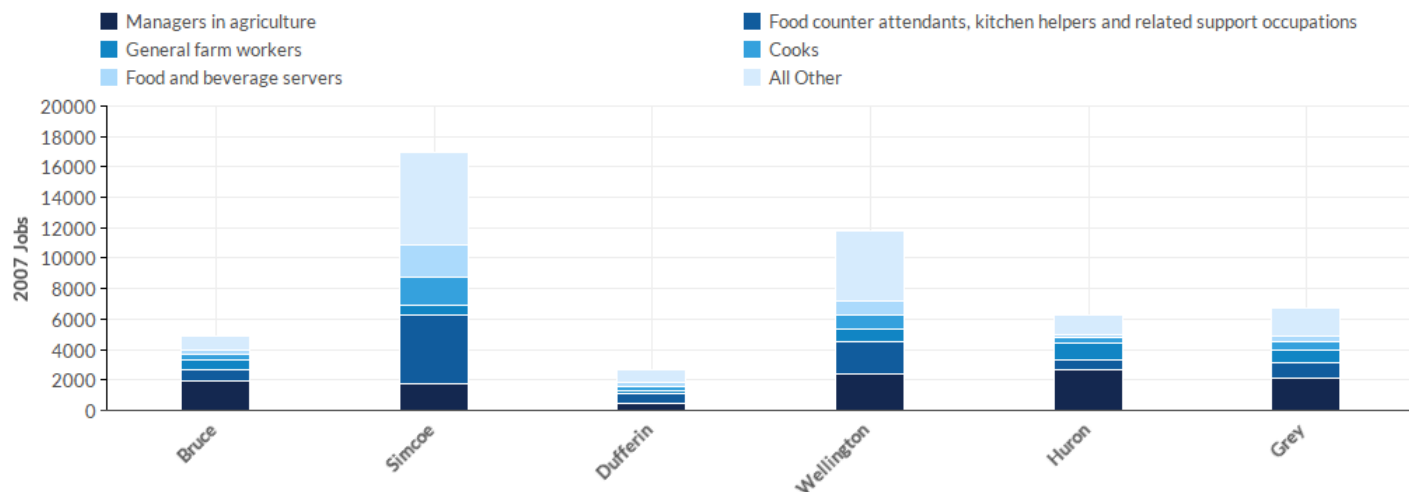


## Occupation Change Summary



Region	2007 Jobs	2022 Jobs	Change	% Change
 Bruce	4,897	3,992	-905	-18%
 Simcoe	17,002	20,594	3,592	21%
 Dufferin	2,634	3,159	525	20%
 Wellington	11,792	15,422	3,630	31%
 Huron	6,292	4,804	-1,488	-24%
 Grey	6,689	7,042	353	5%

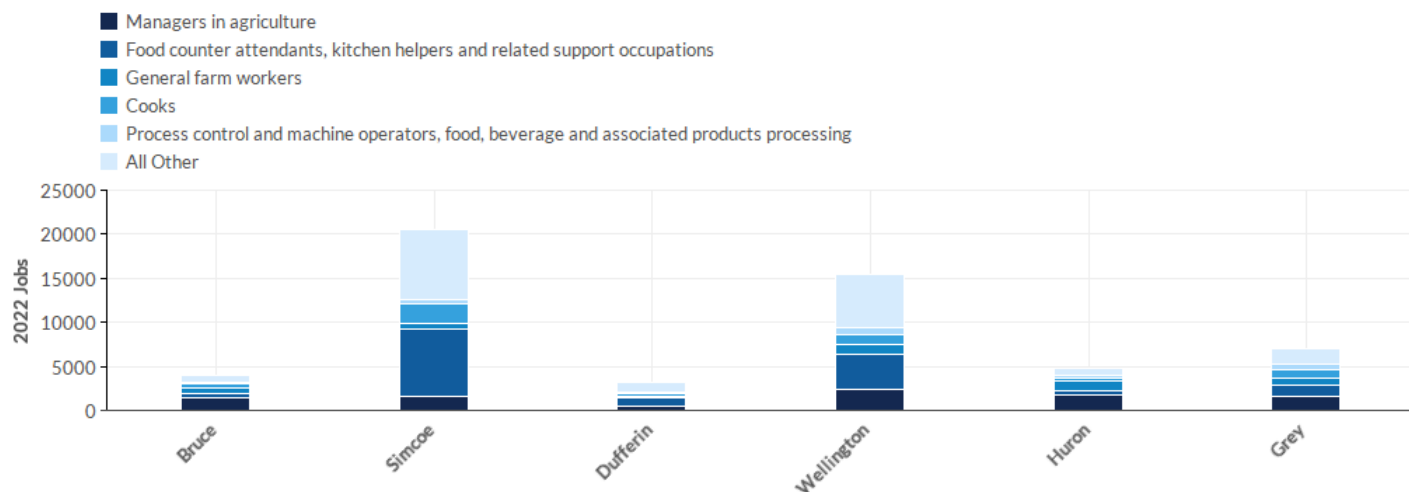
## Occupation Breakdown - 2007 Jobs



Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
0821	Managers in agriculture	1,957	1,708	484	2,388	2,691	2,131
6711	Food counter attendants, kitchen helpers and related support occupations	710	4,524	638	2,130	636	1,043
8431	General farm workers	669	689	144	841	1,125	822
6322	Cooks	328	1,871	256	862	301	495
6513	Food and beverage servers	253	2,060	293	929	229	398
0631	Restaurant and food service managers	205	1,812	212	815	192	341
9461	Process control and machine operators, food, beverage and associated products processing	112	339	43	441	243	296
6332	Bakers	96	415	56	200	84	131
6311	Food service supervisors	91	710	97	335	81	137
6511	Maîtres d'hôtel and hosts/hostesses	57	429	63	197	50	84
9617	Labourers in food, beverage and associated products processing	57	366	30	726	150	194
8611	Harvesting labourers	55	27	<10	28	90	64
6512	Bartenders	54	392	49	173	58	87
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	46	206	41	273	90	67
8432	Nursery and greenhouse workers	43	185	36	192	75	56
6331	Butchers, meat cutters and fishmongers - retail and wholesale	42	321	51	155	39	56
Total		4,897	17,002	2,634	11,792	6,292	6,689

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6321	Chefs	41	573	77	267	37	66
9213	Supervisors, food, beverage and associated products processing	27	133	25	201	41	66
2123	Agricultural representatives, consultants and specialists	12	43	<10	58	19	12
9462	Industrial butchers and meat cutters, poultry preparers and related workers	11	36	<10	408	23	108
8442	Trappers and hunters	10	<10	<10	<10	<10	<10
0822	Managers in horticulture	<10	52	<10	36	11	<10
9465	Testers and graders, food, beverage and associated products processing	<10	58	<10	93	<10	11
9463	Fish and seafood plant workers	<10	<10	<10	<10	<10	<10
9618	Labourers in fish and seafood processing	<10	<10	0	<10	<10	<10
8613	Aquaculture and marine harvest labourers	<10	<10	<10	<10	<10	<10
0823	Managers in aquaculture	0	32	<10	30	0	0
Total		4,897	17,002	2,634	11,792	6,292	6,689

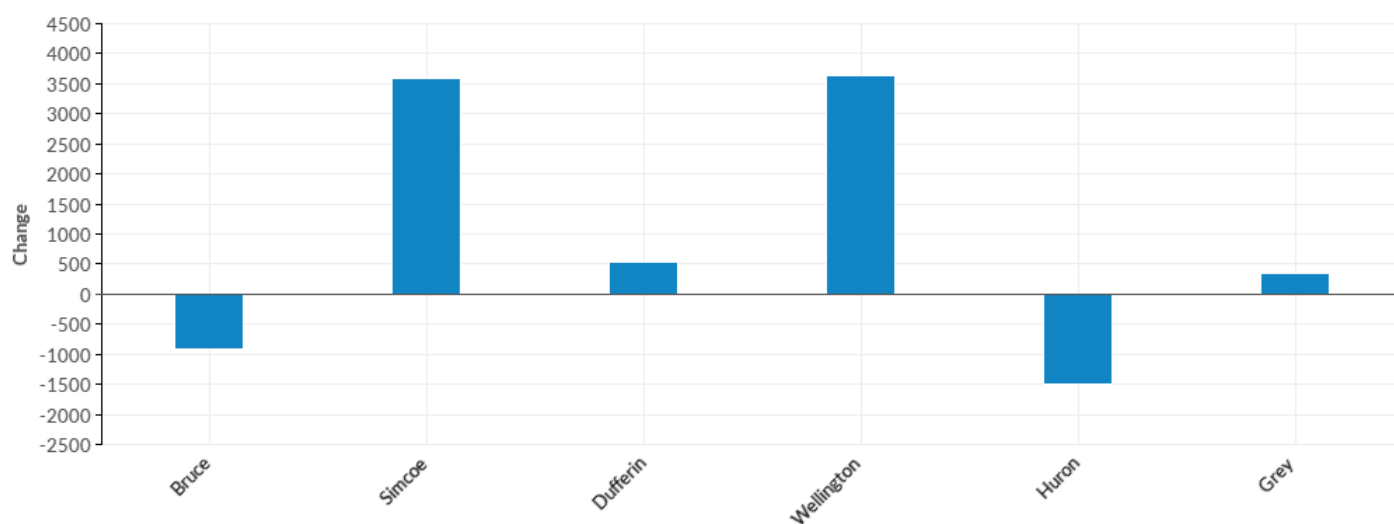
## Occupation Breakdown - 2022 Jobs



Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
0821	Managers in agriculture	1,364	1,519	406	2,377	1,749	1,561
6711	Food counter attendants, kitchen helpers and related support occupations	618	7,662	1,054	4,000	513	1,281
8431	General farm workers	578	731	188	1,140	1,073	895
6322	Cooks	417	2,171	291	1,120	343	866
9461	Process control and machine operators, food, beverage and associated products processing	169	470	102	692	274	677
0631	Restaurant and food service managers	142	1,240	170	729	103	244
6513	Food and beverage servers	129	1,769	238	879	110	300
6321	Chefs	96	533	69	275	76	209
6311	Food service supervisors	91	1,110	150	582	70	185
9617	Labourers in food, beverage and associated products processing	66	526	71	1,141	107	190
6511	Maîtres d'hôtel and hosts/hostesses	65	712	99	363	56	148
6332	Bakers	48	669	91	386	33	80
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	43	151	39	231	75	59
6512	Bartenders	36	674	75	286	41	101
9213	Supervisors, food, beverage and associated products processing	33	149	27	273	38	75
6331	Butchers, meat cutters and fishmongers - retail and wholesale	33	210	30	114	25	48
Total		3,992	20,594	3,159	15,422	4,804	7,042

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
8611	Harvesting labourers	30	28	<10	45	51	42
8432	Nursery and greenhouse workers	13	18	<10	27	27	22
2123	Agricultural representatives, consultants and specialists	<10	30	<10	51	12	<10
9618	Labourers in fish and seafood processing	<10	<10	0	<10	<10	10
9462	Industrial butchers and meat cutters, poultry preparers and related workers	<10	42	<10	450	11	26
9465	Testers and graders, food, beverage and associated products processing	<10	78	13	129	<10	11
8442	Trappers and hunters	<10	<10	<10	<10	<10	<10
0822	Managers in horticulture	<10	85	21	120	<10	<10
8613	Aquaculture and marine harvest labourers	<10	<10	<10	<10	<10	<10
9463	Fish and seafood plant workers	<10	<10	<10	<10	<10	<10
0823	Managers in aquaculture	0	0	0	0	0	0
	Total	3,992	20,594	3,159	15,422	4,804	7,042

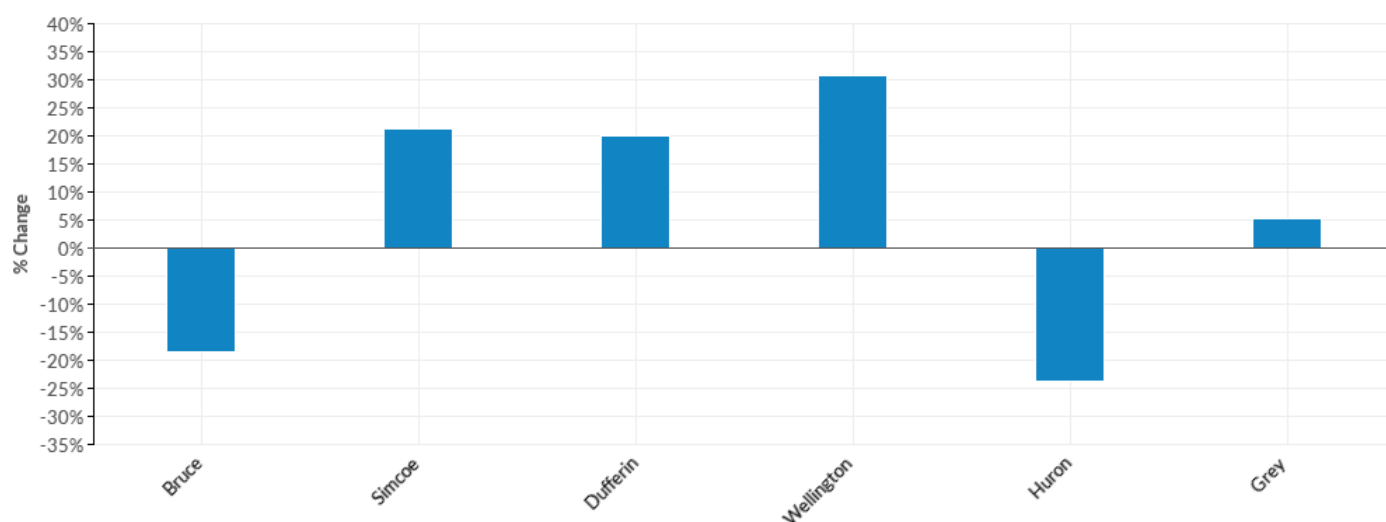
## Occupation Breakdown - Change



Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6322	Cooks	89	300	35	258	42	371
9461	Process control and machine operators, food, beverage and associated products processing	57	131	59	251	31	381
6321	Chefs	55	-40	-8	8	39	143
9617	Labourers in food, beverage and associated products processing	9	160	41	415	-43	-4
6511	Maîtres d'hôtel and hosts/hostesses	8	283	36	166	6	64
9213	Supervisors, food, beverage and associated products processing	6	16	2	72	-3	9
9618	Labourers in fish and seafood processing	--	--	0	--	--	--
0823	Managers in aquaculture	0	-32	--	-30	0	0
6311	Food service supervisors	0	400	53	247	-11	48
8613	Aquaculture and marine harvest labourers	--	--	--	--	--	--
9465	Testers and graders, food, beverage and associated products processing	--	20	--	36	--	0
9463	Fish and seafood plant workers	--	--	--	--	--	--
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	-3	-55	-2	-42	-15	-8
2123	Agricultural representatives, consultants and specialists	--	-13	--	-7	-7	--
0822	Managers in horticulture	--	33	--	84	--	--
Total		-905	3,592	525	3,630	-1,488	353

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
9462	Industrial butchers and meat cutters, poultry preparers and related workers	--	6	--	42	-12	-82
6331	Butchers, meat cutters and fishmongers - retail and wholesale	-9	-111	-21	-41	-14	-8
8442	Trappers and hunters	--	--	--	--	--	--
6512	Bartenders	-18	282	26	113	-17	14
8611	Harvesting labourers	-25	1	--	17	-39	-22
8432	Nursery and greenhouse workers	-30	-167	--	-165	-48	-34
6332	Bakers	-48	254	35	186	-51	-51
0631	Restaurant and food service managers	-63	-572	-42	-86	-89	-97
8431	General farm workers	-91	42	44	299	-52	73
6711	Food counter attendants, kitchen helpers and related support occupations	-92	3,138	416	1,870	-123	238
6513	Food and beverage servers	-124	-291	-55	-50	-119	-98
0821	Managers in agriculture	-593	-189	-78	-11	-942	-570
Total		-905	3,592	525	3,630	-1,488	353

## Occupation Breakdown - % Change

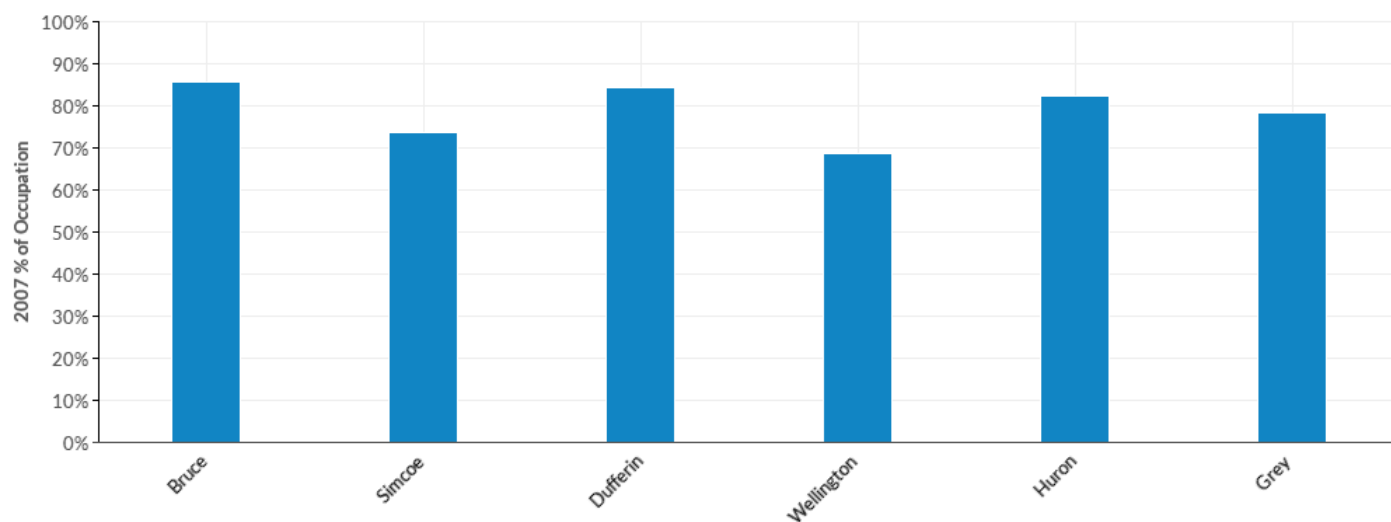


Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6321	Chefs	134%	-7%	-10%	3%	105%	217%
9618	Labourers in fish and seafood processing	--	--	0%	--	--	--
9461	Process control and machine operators, food, beverage and associated products processing	51%	39%	137%	57%	13%	129%
6322	Cooks	27%	16%	14%	30%	14%	75%
9213	Supervisors, food, beverage and associated products processing	22%	12%	8%	36%	-7%	14%
9617	Labourers in food, beverage and associated products processing	16%	44%	137%	57%	-29%	-2%
6511	Maîtres d'hôtel and hosts/hostesses	14%	66%	57%	84%	12%	76%
6311	Food service supervisors	0%	56%	55%	74%	-14%	35%
0823	Managers in aquaculture	0%	-100%	--	-100%	0%	0%
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	-7%	-27%	-5%	-15%	-17%	-12%
6711	Food counter attendants, kitchen helpers and related support occupations	-13%	69%	65%	88%	-19%	23%
8431	General farm workers	-14%	6%	31%	36%	-5%	9%
6331	Butchers, meat cutters and fishmongers - retail and wholesale	-21%	-35%	-41%	-26%	-36%	-14%
0821	Managers in agriculture	-30%	-11%	-16%	0%	-35%	-27%
0631	Restaurant and food service managers	-31%	-32%	-20%	-11%	-46%	-28%
6512	Bartenders	-33%	72%	53%	65%	-29%	16%
Total		-18%	21%	20%	31%	-24%	5%



Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
9465	Testers and graders, food, beverage and associated products processing	--	34%	--	39%	--	0%
8611	Harvesting labourers	-45%	4%	--	61%	-43%	-34%
6513	Food and beverage servers	-49%	-14%	-19%	-5%	-52%	-25%
2123	Agricultural representatives, consultants and specialists	--	-30%	--	-12%	-37%	--
6332	Bakers	-50%	61%	63%	93%	-61%	-39%
8613	Aquaculture and marine harvest labourers	--	--	--	--	--	--
9462	Industrial butchers and meat cutters, poultry preparers and related workers	--	17%	--	10%	-52%	-76%
9463	Fish and seafood plant workers	--	--	--	--	--	--
8432	Nursery and greenhouse workers	-70%	-90%	--	-86%	-64%	-61%
0822	Managers in horticulture	--	63%	--	233%	--	--
8442	Trappers and hunters	--	--	--	--	--	--
Total		-18%	21%	20%	31%	-24%	5%

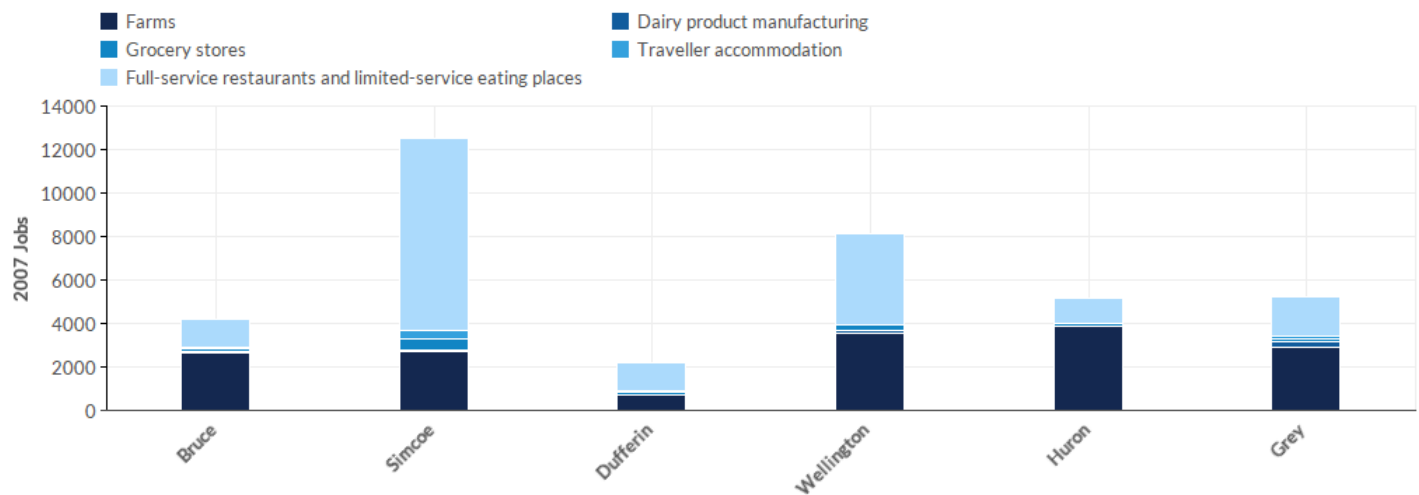
## Top Industries - 2007 % of Occupation



NAICS Code	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
1110	Farms	55%	16%	26%	30%	62%	44%
7225	Full-service restaurants and limited-service eating places	27%	52%	50%	35%	18%	27%
4451	Grocery stores	2%	3%	4%	2%	1%	2%
3115	Dairy product manufacturing	1%	0%	2%	1%	0%	3%
7211	Traveller accommodation	1%	2%	2%	0%	1%	2%
Total		86%	74%	84%	69%	82%	78%

Source: Employees & Self-Employed - Emsi 2016.3

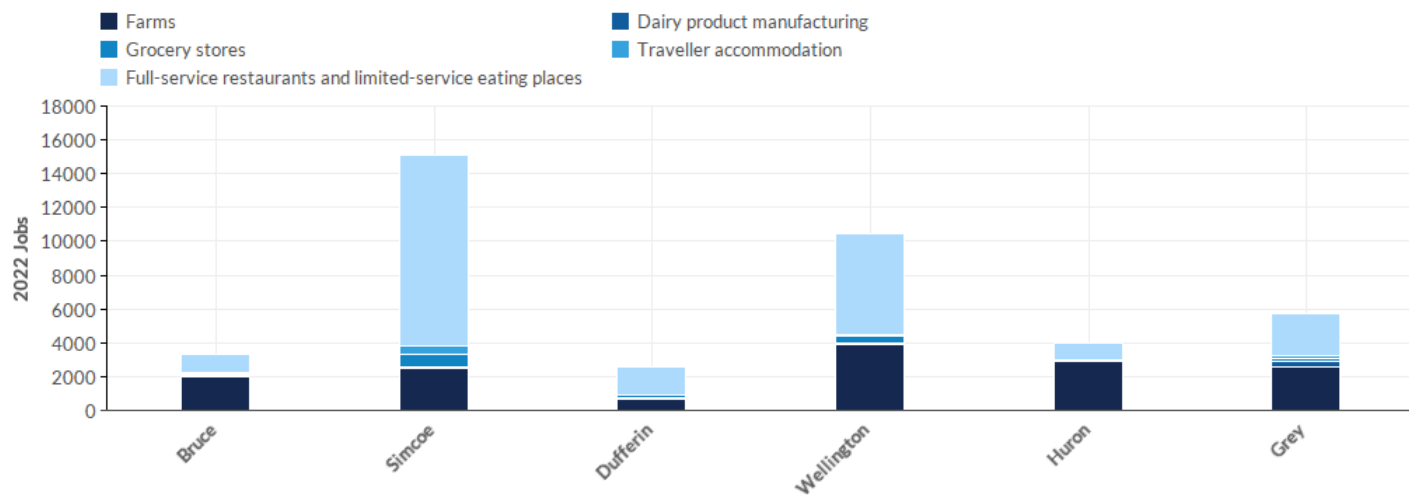
## Top Industries - 2007 Jobs



NAICS Code	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
1110	Farms	2,673	2,707	696	3,565	3,899	2,929
7225	Full-service restaurants and limited-service eating places	1,312	8,829	1,329	4,138	1,146	1,802
4451	Grocery stores	95	553	102	256	80	115
3115	Dairy product manufacturing	65	56	42	84	<10	222
7211	Traveller accommodation	53	351	53	58	45	164
Total		4,199	12,497	2,222	8,101	5,173	5,231

Source: Employees & Self-Employed - Emsi 2016.3

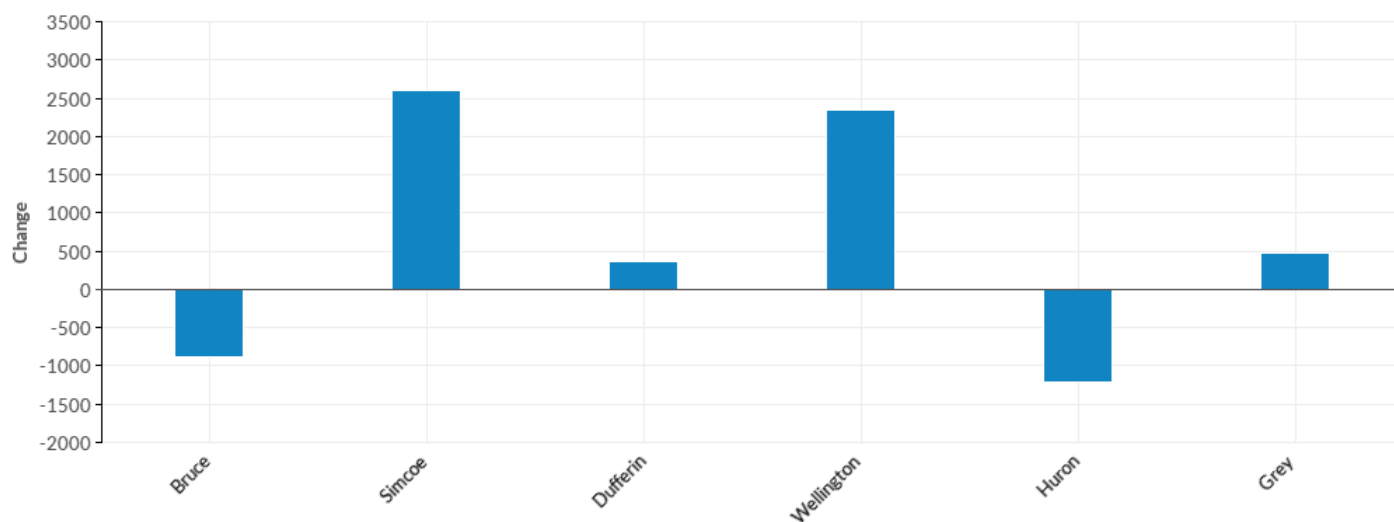
## Top Industries - 2022 Jobs



NAICS Code	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
1110	Farms	2,010	2,508	673	3,926	2,918	2,560
7225	Full-service restaurants and limited-service eating places	1,103	11,278	1,640	5,930	970	2,426
3115	Dairy product manufacturing	102	101	89	79	<10	384
4451	Grocery stores	62	712	116	389	21	90
7211	Traveller accommodation	48	503	63	117	42	237
Total		3,325	15,101	2,581	10,441	3,959	5,698

Source: Employees & Self-Employed - Emsi 2016.3

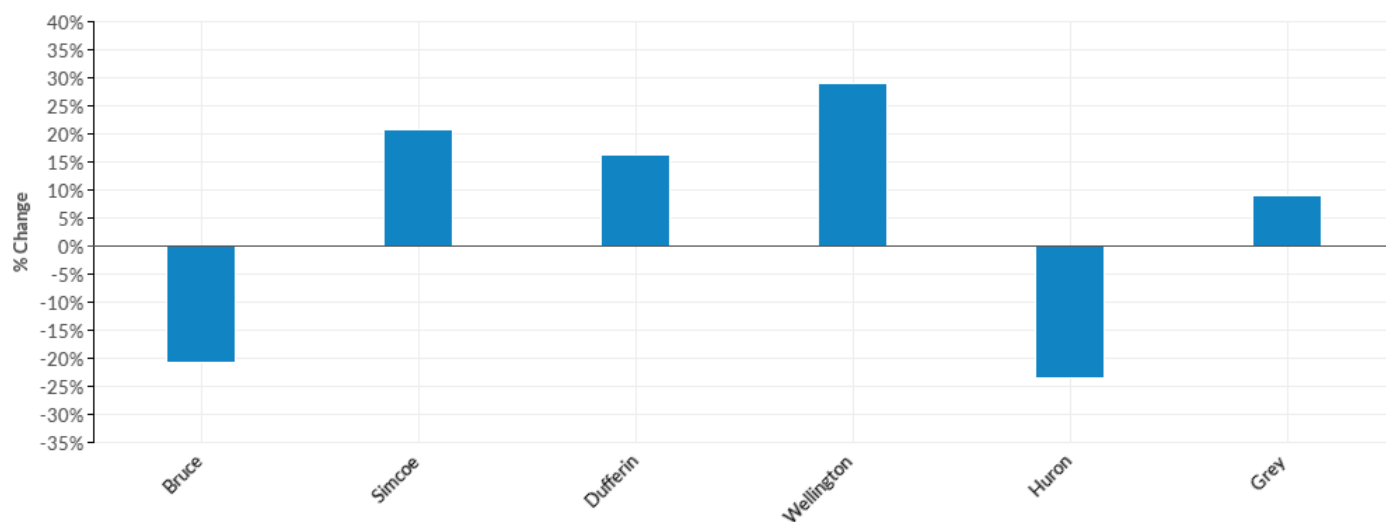
## Top Industries - Change



NAICS Code	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
3115	Dairy product manufacturing	37	45	47	-5	--	162
7211	Traveller accommodation	-5	152	10	59	-3	73
4451	Grocery stores	-33	159	14	133	-59	-25
7225	Full-service restaurants and limited-service eating places	-209	2,449	311	1,792	-176	624
1110	Farms	-663	-199	-23	361	-981	-369
Total		-874	2,604	359	2,340	-1,214	467

Source: Employees & Self-Employed - Emsi 2016.3

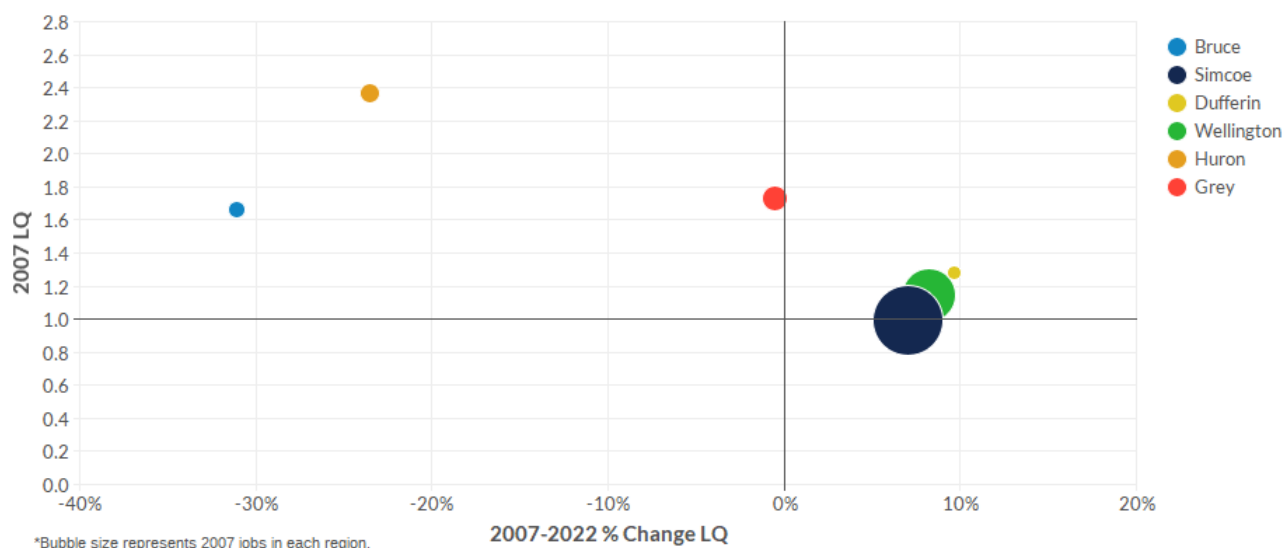
## Top Industries - % Change



NAICS Code	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
3115	Dairy product manufacturing	57%	80%	112%	-6%	--	73%
7211	Traveller accommodation	-9%	43%	19%	102%	-7%	45%
7225	Full-service restaurants and limited-service eating places	-16%	28%	23%	43%	-15%	35%
1110	Farms	-25%	-7%	-3%	10%	-25%	-13%
4451	Grocery stores	-35%	29%	14%	52%	-74%	-22%
Total		-21%	21%	16%	29%	-23%	9%

Source: Employees & Self-Employed - Emsi 2016.3

## Location Quotient Breakdown - 2007 National LQ



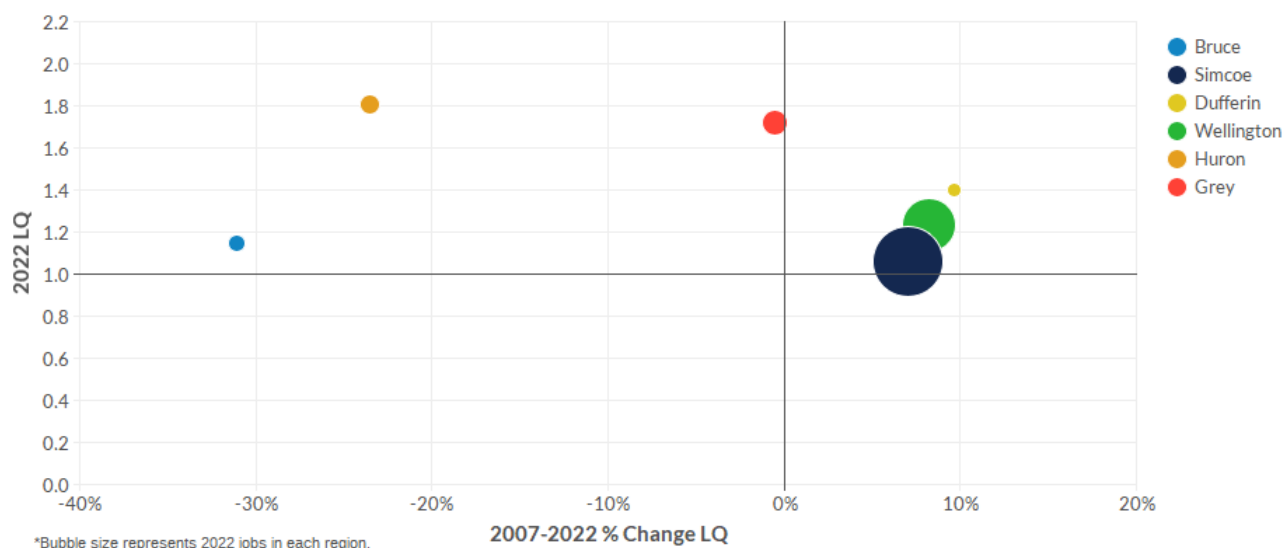
Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
8442	Trappers and hunters	13.49	2.21	2.96	1.76	12.65	6.48
0821	Managers in agriculture	5.58	0.84	1.97	1.94	8.49	4.62
8431	General farm workers	4.98	0.88	1.53	1.78	9.27	4.65
8611	Harvesting labourers	2.51	0.21	0.37	0.36	4.53	2.21
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	2.22	1.69	2.78	3.71	4.75	2.43
2123	Agricultural representatives, consultants and specialists	1.81	1.06	1.32	2.40	3.06	1.32
6332	Bakers	1.34	0.99	1.12	0.79	1.30	1.38
6311	Food service supervisors	1.22	1.64	1.87	1.28	1.20	1.40
6711	Food counter attendants, kitchen helpers and related support occupations	1.20	1.32	1.55	1.03	1.20	1.35
9461	Process control and machine operators, food, beverage and associated products processing	1.20	0.62	0.65	1.34	2.88	2.41
8432	Nursery and greenhouse workers	1.11	0.82	1.32	1.41	2.15	1.10
9213	Supervisors, food, beverage and associated products processing	0.94	0.81	1.27	2.04	1.62	1.78
6322	Cooks	0.88	0.86	0.98	0.66	0.89	1.01
0631	Restaurant and food service managers	0.84	1.28	1.24	0.95	0.87	1.06
6511	Maîtres d'hôtel and hosts/hostesses	0.83	1.08	1.31	0.82	0.82	0.93
6512	Bartenders	0.65	0.81	0.85	0.59	0.77	0.80
Total		1.66	0.99	1.28	1.14	2.37	1.73

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6513	Food and beverage servers	0.64	0.90	1.06	0.67	0.64	0.77
9617	Labourers in food, beverage and associated products processing	0.63	0.70	0.47	2.30	1.84	1.64
6331	Butchers, meat cutters and fishmongers - retail and wholesale	0.60	0.78	1.03	0.63	0.61	0.60
6321	Chefs	0.47	1.12	1.26	0.87	0.47	0.57
0822	Managers in horticulture	0.43	0.54	0.80	0.61	0.72	0.35
8613	Aquaculture and marine harvest labourers	0.40	0.07	0.11	0.12	0.68	0.40
9463	Fish and seafood plant workers	0.32	0.12	0.08	0.13	0.28	0.26
9465	Testers and graders, food, beverage and associated products processing	0.30	0.66	0.56	1.76	0.73	0.54
9462	Industrial butchers and meat cutters, poultry preparers and related workers	0.27	0.16	0.12	2.96	0.64	2.10
9618	Labourers in fish and seafood processing	0.27	0.02	0.01	0.03	0.25	0.30
0823	Managers in aquaculture	0.00	1.70	2.45	2.61	0.00	0.00
	Total	1.66	0.99	1.28	1.14	2.37	1.73

Source: Employees & Self-Employed - Emsi 2016.3



## Location Quotient Breakdown - 2022 National LQ

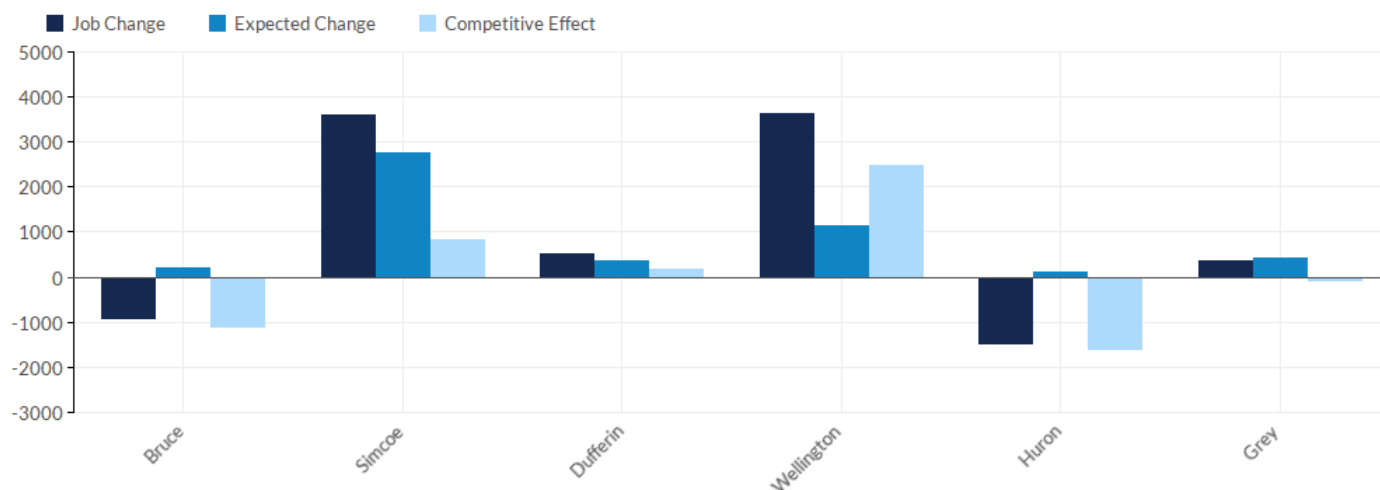


Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
8442	Trappers and hunters	4.41	1.25	5.95	1.11	7.16	5.67
0821	Managers in agriculture	4.37	0.87	2.01	2.12	7.35	4.25
8431	General farm workers	3.51	0.80	1.77	1.93	8.55	4.62
8611	Harvesting labourers	2.55	0.44	0.95	1.08	5.71	3.07
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	1.99	1.25	2.77	2.95	4.52	2.29
9461	Process control and machine operators, food, beverage and associated products processing	1.56	0.78	1.46	1.79	3.33	5.33
6322	Cooks	0.96	0.90	1.04	0.72	1.04	1.69
9213	Supervisors, food, beverage and associated products processing	0.80	0.64	1.00	1.83	1.21	1.54
6711	Food counter attendants, kitchen helpers and related support occupations	0.78	1.73	2.05	1.40	0.85	1.37
2123	Agricultural representatives, consultants and specialists	0.76	0.70	0.93	1.87	1.97	0.90
6321	Chefs	0.69	0.70	0.78	0.56	0.72	1.29
9617	Labourers in food, beverage and associated products processing	0.69	0.99	1.14	3.34	1.48	1.69
0631	Restaurant and food service managers	0.64	1.00	1.18	0.91	0.60	0.93
6311	Food service supervisors	0.60	1.31	1.52	1.06	0.60	1.03
9618	Labourers in fish and seafood processing	0.60	0.06	0.03	0.06	0.94	1.13
6511	Maîtres d'hôtel and hosts/hostesses	0.51	1.00	1.20	0.79	0.57	0.98
Total		1.15	1.06	1.40	1.24	1.81	1.72

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6332	Bakers	0.49	1.22	1.43	1.09	0.44	0.69
6512	Bartenders	0.47	1.59	1.53	1.05	0.70	1.13
8432	Nursery and greenhouse workers	0.39	0.10	0.22	0.23	1.08	0.57
6331	Butchers, meat cutters and fishmongers - retail and wholesale	0.35	0.40	0.50	0.34	0.36	0.44
6513	Food and beverage servers	0.28	0.69	0.80	0.53	0.31	0.55
9465	Testers and graders, food, beverage and associated products processing	0.27	1.10	1.55	2.83	0.56	0.72
8613	Aquaculture and marine harvest labourers	0.19	0.23	0.49	0.51	0.53	0.29
9462	Industrial butchers and meat cutters, poultry preparers and related workers	0.10	0.20	0.21	3.30	0.40	0.57
0822	Managers in horticulture	0.10	1.20	2.59	2.61	0.21	0.11
9463	Fish and seafood plant workers	0.05	0.09	0.09	0.09	0.07	0.07
0823	Managers in aquaculture	0.00	0.00	0.00	0.00	0.00	0.00
	Total	1.15	1.06	1.40	1.24	1.81	1.72

Source: Employees & Self-Employed - Emsi 2016.3

## Shift Share Breakdown - Job Change

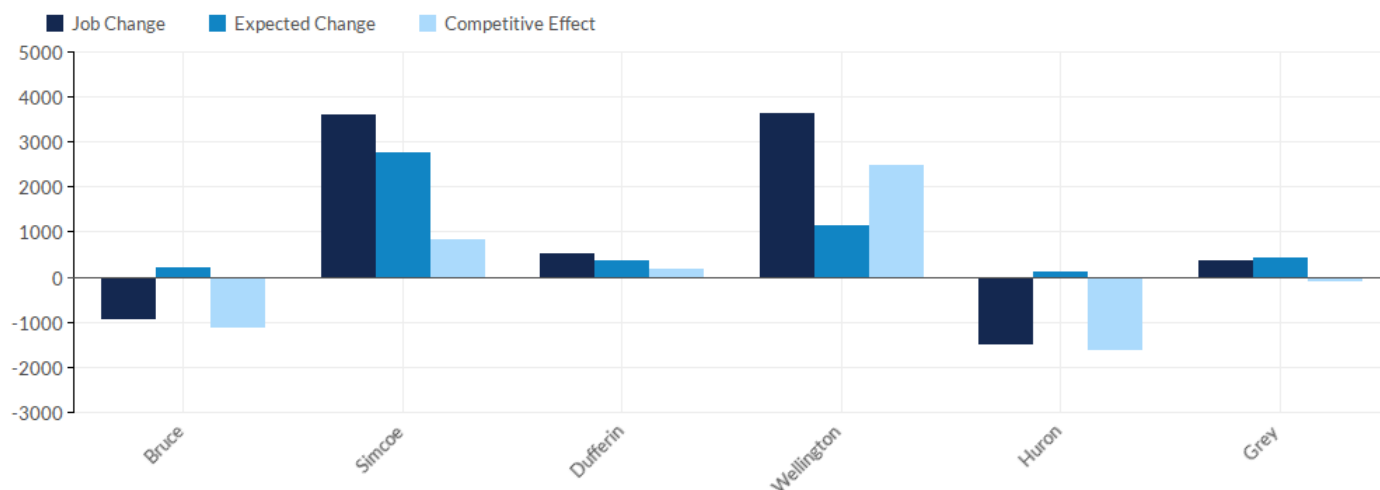


Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6322	Cooks	89	299	35	257	42	371
9461	Process control and machine operators, food, beverage and associated products processing	57	131	59	251	31	381
6321	Chefs	54	-40	-8	7	38	144
9617	Labourers in food, beverage and associated products processing	9	159	41	415	-42	-4
6511	Maîtres d'hôtel and hosts/hostesses	8	283	37	166	5	64
9213	Supervisors, food, beverage and associated products processing	7	16	2	72	-3	9
9618	Labourers in fish and seafood processing	2	1	0	1	3	6
6311	Food service supervisors	1	400	53	247	-11	48
0823	Managers in aquaculture	0	-32	-6	-30	0	0
8613	Aquaculture and marine harvest labourers	-1	4	1	6	-1	-1
9465	Testers and graders, food, beverage and associated products processing	-1	20	7	36	-5	0
9463	Fish and seafood plant workers	-3	-2	0	-1	-2	-3
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	-3	-55	-2	-42	-15	-8
0822	Managers in horticulture	-6	33	12	84	-9	-6
2123	Agricultural representatives, consultants and specialists	-7	-13	-2	-6	-8	-4
Total		-905	3,593	525	3,630	-1,488	354

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
9462	Industrial butchers and meat cutters, poultry preparers and related workers	-7	6	2	42	-11	-83
8442	Trappers and hunters	-9	-8	0	-3	-7	-4
6331	Butchers, meat cutters and fishmongers - retail and wholesale	-10	-111	-20	-42	-13	-8
6512	Bartenders	-18	282	26	113	-17	14
8611	Harvesting labourers	-26	1	1	17	-39	-22
8432	Nursery and greenhouse workers	-31	-167	-31	-165	-49	-34
6332	Bakers	-48	255	35	186	-51	-51
0631	Restaurant and food service managers	-63	-572	-42	-86	-89	-98
8431	General farm workers	-91	42	44	299	-52	73
6711	Food counter attendants, kitchen helpers and related support occupations	-92	3,138	416	1,869	-123	238
6513	Food and beverage servers	-124	-291	-55	-50	-119	-98
0821	Managers in agriculture	-593	-188	-79	-11	-942	-570
	Total	-905	3,593	525	3,630	-1,488	354

Source: Employees & Self-Employed - Emsi 2016.3

## Shift Share Breakdown - Expected Change

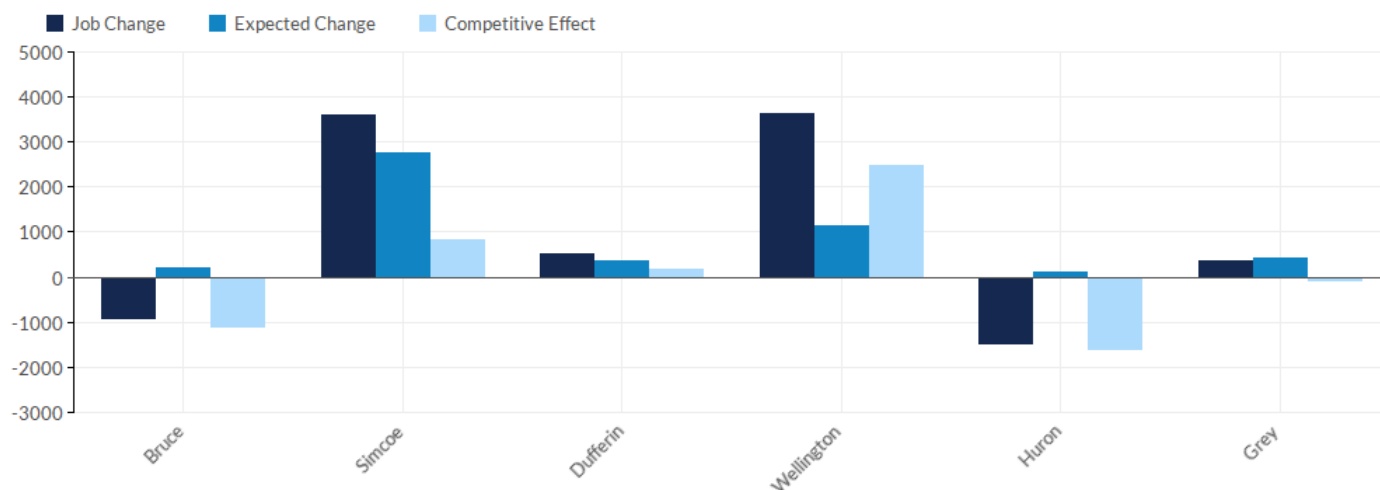


Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6711	Food counter attendants, kitchen helpers and related support occupations	202	1,290	182	607	181	297
8431	General farm workers	111	114	24	140	187	137
6311	Food service supervisors	86	673	92	318	77	130
6511	Maîtres d'hôtel and hosts/hostesses	44	334	49	153	39	65
6322	Cooks	36	206	28	95	33	55
6332	Bakers	30	128	17	61	26	40
6513	Food and beverage servers	28	231	33	104	26	45
6321	Chefs	20	279	38	130	18	32
6331	Butchers, meat cutters and fishmongers - retail and wholesale	11	85	13	41	10	15
9461	Process control and machine operators, food, beverage and associated products processing	11	33	4	43	24	29
9213	Supervisors, food, beverage and associated products processing	11	53	10	81	17	27
2123	Agricultural representatives, consultants and specialists	1	3	0	3	1	1
9617	Labourers in food, beverage and associated products processing	1	4	0	7	1	2
0823	Managers in aquaculture	0	-25	-4	-23	0	0
8613	Aquaculture and marine harvest labourers	0	0	0	0	0	0
9463	Fish and seafood plant workers	0	0	0	0	0	0
Total		211	2,771	363	1,148	121	429

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	-1	-2	0	-3	-1	-1
9462	Industrial butchers and meat cutters, poultry preparers and related workers	-1	-3	0	-31	-2	-8
9465	Testers and graders, food, beverage and associated products processing	-1	-11	-1	-18	-2	-2
9618	Labourers in fish and seafood processing	-1	-1	0	0	-1	-2
0822	Managers in horticulture	-2	-14	-3	-10	-3	-2
8442	Trappers and hunters	-6	-6	-1	-3	-5	-4
6512	Bartenders	-7	-49	-6	-22	-7	-11
8432	Nursery and greenhouse workers	-9	-38	-7	-39	-15	-11
0631	Restaurant and food service managers	-27	-237	-28	-106	-25	-45
8611	Harvesting labourers	-27	-13	-3	-14	-45	-32
0821	Managers in agriculture	-300	-262	-74	-366	-413	-327
Total		211	2,771	363	1,148	121	429

Source: Employees & Self-Employed - Emsi 2016.3

## Shift Share Breakdown - Competitive Effect



Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
6322	Cooks	52	93	7	162	9	316
9461	Process control and machine operators, food, beverage and associated products processing	46	98	55	208	7	352
6321	Chefs	34	-318	-46	-123	20	112
9617	Labourers in food, beverage and associated products processing	9	156	41	408	-44	-6
9618	Labourers in fish and seafood processing	3	2	0	1	4	7
8611	Harvesting labourers	2	15	4	31	5	10
0823	Managers in aquaculture	0	-7	-1	-6	0	0
9465	Testers and graders, food, beverage and associated products processing	0	32	8	54	-3	2
8613	Aquaculture and marine harvest labourers	-1	4	1	6	-1	-1
8442	Trappers and hunters	-3	-2	1	-1	-2	0
9463	Fish and seafood plant workers	-3	-1	0	-1	-2	-3
8252	Agricultural service contractors, farm supervisors and specialized livestock workers	-3	-53	-1	-39	-14	-8
9213	Supervisors, food, beverage and associated products processing	-4	-38	-8	-9	-20	-17
0822	Managers in horticulture	-4	47	15	93	-6	-4
9462	Industrial butchers and meat cutters, poultry preparers and related workers	-6	9	2	73	-9	-75
Total		-1,116	822	162	2,481	-1,609	-75

Occupation	Description	Bruce	Simcoe	Dufferin	Wellington	Huron	Grey
2123	Agricultural representatives, consultants and specialists	-7	-15	-2	-10	-9	-5
6512	Bartenders	-11	332	32	135	-10	25
6331	Butchers, meat cutters and fishmongers - retail and wholesale	-21	-196	-34	-83	-24	-22
8432	Nursery and greenhouse workers	-22	-129	-24	-126	-33	-23
0631	Restaurant and food service managers	-36	-335	-14	20	-64	-53
6511	Maîtres d'hôtel and hosts/hostesses	-36	-51	-12	12	-34	-2
6332	Bakers	-77	127	17	125	-77	-91
6311	Food service supervisors	-86	-273	-39	-71	-88	-82
6513	Food and beverage servers	-153	-522	-88	-154	-145	-142
8431	General farm workers	-203	-72	20	159	-239	-63
0821	Managers in agriculture	-293	74	-5	355	-529	-243
6711	Food counter attendants, kitchen helpers and related support occupations	-294	1,849	234	1,262	-305	-60
Total		-1,116	822	162	2,481	-1,609	-75

Source: Employees & Self-Employed - Emsi 2016.3



# Appendix A - Occupations

Code	Description
0631	Restaurant and food service managers
0821	Managers in agriculture
0822	Managers in horticulture
0823	Managers in aquaculture
2123	Agricultural representatives, consultants and specialists
6311	Food service supervisors
6321	Chefs
6322	Cooks
6331	Butchers, meat cutters and fishmongers - retail and wholesale
6332	Bakers
6511	Maîtres d'hôtel and hosts/hostesses
6512	Bartenders
6513	Food and beverage servers
6711	Food counter attendants, kitchen helpers and related support occupations
8252	Agricultural service contractors, farm supervisors and specialized livestock workers
8431	General farm workers
8432	Nursery and greenhouse workers
8442	Trappers and hunters
8611	Harvesting labourers
8613	Aquaculture and marine harvest labourers
9213	Supervisors, food, beverage and associated products processing
9461	Process control and machine operators, food, beverage and associated products processing
9462	Industrial butchers and meat cutters, poultry preparers and related workers
9463	Fish and seafood plant workers
9465	Testers and graders, food, beverage and associated products processing
9617	Labourers in food, beverage and associated products processing
9618	Labourers in fish and seafood processing

# Appendix B - Data Sources and Calculations

## Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. Emsi's occupation data are based on Emsi's industry data, regional occupation data from the Labour Force Survey (LFS), and regional staffing patterns taken from the Census.

## Staffing Patterns Data

The staffing patterns data in this report is compiled from several sources using a specialized process. Sources include the Labour Force Survey (LFS) and the Census. Emsi uses ratios from the Census and inputs regional jobs by industry, converting these to jobs by occupation. The ratios derived from this are adjusted to equal actual regional data, resulting in a unique regional staffing pattern.

# Occupation Overview

Emsi Q3 2016 Data Set

March 2017

Region of Waterloo



Region of Waterloo

# Parameters

## Occupations

27 items selected. See Appendix A for details.

## Regions

Code	Description
3542004	West Grey
3542005	Southgate
3542015	Grey Highlands
3542029	Hanover
3542037	Chatsworth
3542045	The Blue Mountains
3542047	Meaford
3542053	Georgian Bluffs
3542059	Owen Sound
4609017	Grey

## Timeframe

2007 - 2022

## Datarun

2016.3 – Employees and Self-Employed

Occupation Summary for ag and food 4-digit

<div>7,098</div> <div>Jobs (2015)</div> <div>77% above National average</div>	<div>+3.7%</div> <div>% Change (2007-2022)</div> <div>Nation: +12.6%</div>
---	--

## Growth

7,017

2007 Jobs

7,275

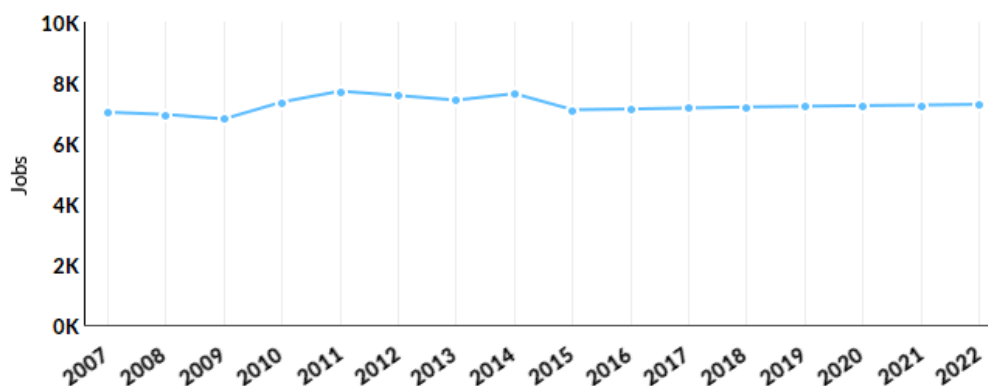
2022 Jobs

258

Change (2007-2022)

3.7%

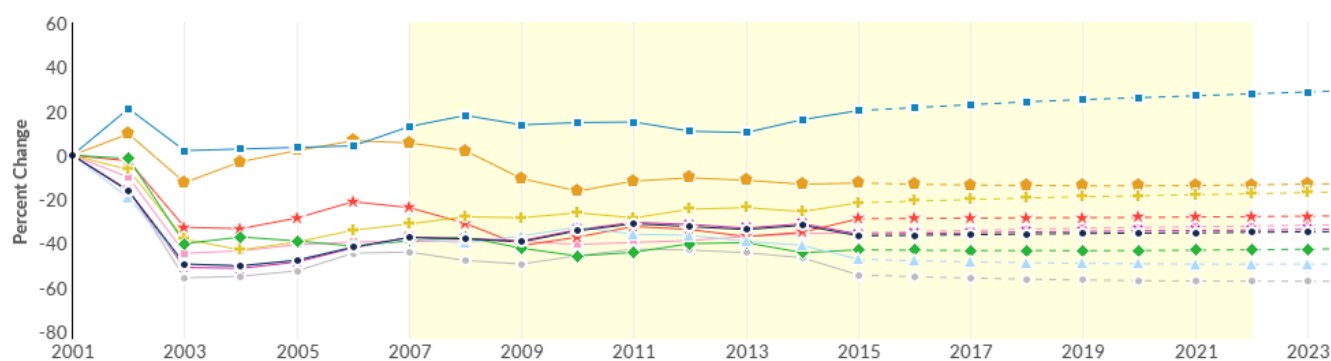
% Change (2007-2022)



Occupation	2007 Jobs	2022 Jobs	Change	% Change
Restaurant and food service managers (0631)	342	244	-98	-29%
Managers in agriculture (0821)	2,346	1,735	-611	-26%
Managers in horticulture (0822)	8	2	-6	-75%
Managers in aquaculture (0823)	0	0	0	0%
Agricultural representatives, consultants and specialists (2123)	24	15	-9	-38%
Food service supervisors (6311)	137	186	49	36%
Chefs (6321)	66	209	143	217%
Cooks (6322)	500	868	368	74%
Butchers, meat cutters and fishmongers - retail and wholesale (6331)	56	48	-8	-14%
Bakers (6332)	131	80	-51	-39%
Maitres d'hôtel and hosts/hostesses (6511)	84	148	64	76%
Bartenders (6512)	88	101	13	15%
Food and beverage servers (6513)	401	301	-100	-25%
Food counter attendants, kitchen helpers and related support occupations (6711)	1,046	1,284	238	23%
Agricultural service contractors, farm supervisors and specialized livestock workers (8252)	73	61	-12	-16%
General farm workers (8431)	897	929	32	4%

Occupation	2007 Jobs	2022 Jobs	Change	% Change
Nursery and greenhouse workers (8432)	56	23	-33	-59%
Trappers and hunters (8442)	6	2	-4	-67%
Harvesting labourers (8611)	67	44	-23	-34%
Aquaculture and marine harvest labourers (8613)	2	1	-1	-50%
Supervisors, food, beverage and associated products processing (9213)	66	75	9	14%
Process control and machine operators, food, beverage and associated products processing (9461)	299	680	381	127%
Industrial butchers and meat cutters, poultry preparers and related workers (9462)	109	26	-83	-76%
Fish and seafood plant workers (9463)	4	1	-3	-75%
Testers and graders, food, beverage and associated products processing (9465)	12	12	0	0%
Labourers in food, beverage and associated products processing (9617)	195	190	-5	-3%
Labourers in fish and seafood processing (9618)	4	10	6	150%

## Regional Trends



Region	2007 Jobs	2022 Jobs	Change	% Change
Region	7,017	7,275	258	3.7%
Brant County	6,578	7,443	865	13.1%
Bruce County	4,897	3,992	-905	-18.5%
Chatham-Kent	6,770	6,319	-451	-6.7%
Dufferin County	2,634	3,159	525	19.9%
Elgin County	3,528	3,341	-187	-5.3%
Essex County	10,273	8,420	-1,853	-18.0%
Grey County	6,689	7,042	353	5.3%
Huron County	6,292	4,804	-1,488	-23.6%
Lambton County	6,567	7,344	777	11.8%



# Regional Breakdown



Census Subdivision	2022 Jobs
Owen Sound	1,342
Grey Highlands	1,080
The Blue Mountains	1,059
Hanover	1,024
West Grey	815

## Occupational Programs

0 Programs (2013)	0 Completions (2013)
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## Industries Employing ag and food 4-digit

Industry	Occupation Group Jobs in Industry (2015)	% of Occupation Group in Industry (2015)	% of Total Jobs in Industry (2015)
Farms	2,923	41.2%	85.7%
Full-service restaurants and limited-service eating places	2,236	31.5%	79.3%
Dairy product manufacturing	341	4.8%	61.8%
Traveller accommodation	214	3.0%	20.6%
Beverage manufacturing	194	2.7%	48.3%

# Appendix A - Occupations

Code	Description
0631	Restaurant and food service managers
0821	Managers in agriculture
0822	Managers in horticulture
0823	Managers in aquaculture
2123	Agricultural representatives, consultants and specialists
6311	Food service supervisors
6321	Chefs
6322	Cooks
6331	Butchers, meat cutters and fishmongers - retail and wholesale
6332	Bakers
6511	Maîtres d'hôtel and hosts/hostesses
6512	Bartenders
6513	Food and beverage servers
6711	Food counter attendants, kitchen helpers and related support occupations
8252	Agricultural service contractors, farm supervisors and specialized livestock workers
8431	General farm workers
8432	Nursery and greenhouse workers
8442	Trappers and hunters
8611	Harvesting labourers
8613	Aquaculture and marine harvest labourers
9213	Supervisors, food, beverage and associated products processing
9461	Process control and machine operators, food, beverage and associated products processing
9462	Industrial butchers and meat cutters, poultry preparers and related workers
9463	Fish and seafood plant workers
9465	Testers and graders, food, beverage and associated products processing
9617	Labourers in food, beverage and associated products processing
9618	Labourers in fish and seafood processing

# Appendix B - Data Sources and Calculations

## Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. Emsi's occupation data are based on Emsi's industry data, regional occupation data from the Labour Force Survey (LFS), and regional staffing patterns taken from the Census.

## APPENDIX 2

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### Consultation Session Summaries 1 & 2

Queens Executive Decision Centre



# GREY COUNTY LOCAL FOOD STRATEGY

**STAKEHOLDER ENGAGEMENT SESSION #1 HIGHLIGHTS  
JANUARY 18, 2017**

***Participants:***  
*See participant list*  
***In Association with:***  
***Queen's University Executive Decision Centre***  
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## Executive Summary

Attached are proceedings from a stakeholder meeting held on January 18, 2017 in Flesherton. The purpose of the workshop was to gather input on a Local Food strategy for Grey County.

The session began with a briefing on the project, previous work, current undertakings, and relevant provincial initiatives. The group then reviewed and ranked six local food priorities from 2014. The group brainstormed over 60 potential new projects. The group narrowed these down to 15 based on importance, feasibility and potential for County involvement. Individuals then voted on his/her top six projects. The group reviewed these and further discussed the top eight by attaching rationale and objectives for each. Finally, participants were asked for expressions of interest on the projects identified.

## Selected Projects

1. Grey County **branding and market** the same. Similar to VQA in the wine industry. Website for marketing of Grey County
2. Research a **Grey County processing center**.
3. **Grants - micro granting** - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched ...
4. County to make **short videos** of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China): education, sustainability for agri-tourism
5. Bring back & **support Food Link Grey Bruce** to provide better connections between producers, suppliers and consumers
6. **Soil stewardship**... grants/education/mentorship
7. Initiatives **to spend locally**, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first.
8. Grey County to support all **local farmers' markets** thru funding, advertising, listings, etc. with extensive collaboration with Ontario Travel/province/OMAFRA

### Editor's Notes:

- a. The symbol // or ... indicates that two similar ideas have been merged together.
- b. This document contains the meeting proceedings and is not intended as a "Final Report"

## 1.0 – Review of 2014 Local Food Priorities

What are the top three priorities still important?

Item	PRIORITIES FROM 2013-2014	Average	#votes/20
4	Development of Stand-Alone Brand for Grey County Products	0.75	15
1	Cluster Development and Support	0.65	13
6	Micro-Granting Program for new/small businesses	0.55	11
5	Closer Alignment with Tourism Initiatives	0.50	10
2	Strategic Alignment with Provincial Initiatives	0.25	5
3	Feasibility Research into Development of Comprehensive Food Hub	0.25	5

## 2.0 - Projects

What are some potential projects for the next 2-3 years?

The group brainstormed ideas in small teams (2.1). Then each team selected its top 3 ideas to share with the plenary (2.2). Finally, individuals were asked to identify "if we could only address three projects in the next two years..." (2.3)

### 2.1 - Formulation

*if we could only pursue SIX...*

- 1) Grey County branding and market the same. Similar to VQA in the wine industry.
  - 1.1) creative, marketing and branding. "the package is the product" Go Grey County!
  - 1.2) Website for marketing of Grey County - listing service, any products what is produced here, Foodlink, signage/branding – i.e. barn quilts
- 2) Grants - micro granting - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched ...funding for start up growers and producers/processors
  - 2.1) Grants for new initiatives and/or expansion
- 3) Soil stewardships... grants/education/mentorship
- 4) Bring back & support Food Link Grey Bruce to provide better connections between producers, suppliers and consumers
- 5) County to make short videos of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China): education, sustainability for agri-tourism
- 6) Research a grey county processing center. We need a place to cut and process our meat and vegis
- 7) initiatives to spend locally, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first. BUY LOCAL !!!!!
- 8) Peer training opportunities/more education
  - 1) new technologies/techniques to have access to how to produce most economically and profitability promote ecologically and conservation practices
  - 2) ensure safety of food, consumer perspective of what is safe and healthy - restore confidence of our local foods produced here.
- 9) County to overtly demonstrate support for all forms of agriculture - small, large, organic, non-organic, livestock, horticulture, etc.: Programs to educate public on where their food comes from and how it is produced.
- 10) Grey County to support all local farmers' markets thru funding, advertising, listings, etc., with extensive collaboration with Ontario Travel/province/OMAFRA
- 11) help to enhance and grow associations such as Grey Bruce ACA to build a stronger voice for all agricultural producers

- 12) Competitive chef contest cook a meal once a month using local food in local restaurants
- 13) Develop an "Uber" type central communication system for distribution ... central repository concept with a pool of on-call people \* Freshspoke.com
- 14) Look at Oxford County Tourism/Oxford cheese trail; should we do a Grey County Local Food Trail?
- 15) Food Fair at Grey Roots museum

**Ideas that did not make the 1<sup>st</sup> screening:**

Number of Contributions: 68

**(1) Team 1**

- (1/1) agri-tourism - sustainability, education
- (1/2) Collective advertisement to continue to develop the Grey Brand for food & Agriculture
- (1/3) develop demand both from within Grey and "from away" thru marketing and advertisements
- (1/4) buy local, local branding
- (1/5) collaborate more with the Travel Ontario/ province to support farmers' markets

**(2) Team 2**

- (2/1) initiatives to spend locally
- (2/2) education (marketing) for benefits of local food
- (2/3) buy local, local branding
- (2/4) Grey County farmers market at Grey Roots Museum at least once a week (Friday afternoons/evenings)
- (2/5) local distribution hub/team

**(3) Team 3**

- (3/1) Putting soil health first. Ontario ENVIRONMENT COMMISSIONERS REPORT.
- (3/2) Food dollar matching for buying locally
- (3/3) Grey County branding... more by regional landscape. Grown green on good soil
- (3/4) Look at Northumberland County's food processing (Ontario ag food oafvc venture centre) center.
- (3/5) make local specific agronomy accessible to growers in Grey County
- (3/6) more money spent to market local producers/growers/market stores

**(4) Team 4**

- (4/1) Tourism is a great idea, because it benefits both sides, it benefits the tourism industry and the producers.
- (4/2) part time help needed for producers; community help is an asset.
- (4/3) Micro grants; whole amount to be a grant or start paying back after 5 years if making a profit.
- (4/4) Branding; promoting us a community of producers is huge.
- (4/5) Producers have a difficult time finding ready to use ingredients is there a way to change this?
- (4/6) Food Fair specifically for producers and growers in Grey County
- (4/7) A chef's tour. they visit restaurants and encourage restaurants to use local food; Food fair/top chef contest

(4/8) Top chef grey county contest

**(5) Team 5**

(5/1) Branding project of Grey County projects, bring the smaller communities together and promote each other, quality in Grey County NOT quantity, varieties - specialty crops & products

(5/2) Clusters - food hubs

(5/3) new technologies/techniques - need to have access to how to produce most economically and profitability, promote ecologically and conservation practices - value it gives to the county and products

**(6) Team 6**

(6/1) stop consulting and do something !!!!!!!!!!!!!!!!!!!!!1

(6/2) Better connections between producers and suppliers

(6/3) Grey County farmers market at Grey Roots Museum at least once a week (Friday afternoons/evenings)

(6/4) More education on the importance of the relationship between local food and tourism

(6/5) Provide support and software for nutritional labels and ingredient percentages

**(7) Team 7**

(7/1) Community processing and cooking facility with trained helpers

## 2.2 - Selection

Item	LOCAL FOOD PROJECTS	Average	#votes/20
1	Grey County branding and market the same. Similar to VQA in the wine industry. Website for marketing of Grey County	0.70	14
6	Research a grey county processing center. We need a place to cut and process our meat and vegis	0.70	14
2	Grants - micro granting - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched ...funding for start up growers and producers/processors	0.65	13
5	County to make short videos of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China) : education, sustainability for agri-tourism	0.55	11
4	Bring back & support Food Link Grey Bruce to provide better connections between producers, suppliers and consumers	0.50	10
3	Soil stewardships... grants/education/mentorship	0.40	8
7	initiatives to spend locally, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first. BUY LOCAL !!!!!	0.35	7
9	County to overtly demonstrate support for all forms of agriculture - small, large, organic, non-organic, livestock, horticulture, etc.: Programs to educate public on where their food comes from and how it is produced.	0.35	7
10	Grey County to support all local farmers' markets thru funding, advertising, listings, etc. with extensive collaboration with Ontario Travel/province/OMAFRA	0.35	7
11	help to enhance and grow associations such as Grey Bruce ACA to build a stronger voice for all agricultural producers	0.25	5
8	Peer training opportunities/more education 1) new technologies/techniques to have access to how to produce most economically and profitability promote ecologically and conservation practices 2) ensure safety of food, consumer perspective of what is safe and healthy - restore confidence of our local foods produced here	0.20	4
12	Competitive chef contest cook a meal once a month using local food in local restaurants	0.20	4
13	Develop an "Uber" type central communication system for distribution ... central repository concept with a pool of on-call people * Freshspoke.com	0.20	4
14	Look at Oxford County Tourism/Oxford cheese trail; should we do a Grey County Local Food Trail?	0.15	3
15	Food Fair at Grey Roots museum	0.15	3

## 2.3 – Development of Rationale and Objectives for top 7

1) Grey County branding and market the same. Similar to VQA in the wine industry. Website for marketing of Grey County

**Rationale:** promote GC products as above average, recognizable to public, quick first glance distinctive "comes from Grey County"

2) Research a Grey County processing center.

**Rationale:** Manufacturing, value add, product development (see Northumberland County) ... We need a place to cut and process our meat and vegis ... there is a short fall in middle of value chain... frozen storage for meats... a commercial kitchen (e.g. pickle)

3) Grants - micro granting - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched ...

**Rationale:** kick start funding for start up growers and producers/processors

4) County to make short videos of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China): education, sustainability for agri-tourism

**Rationale:** reinforce the marketing messaging ... consumer education re: benefits of local food ... good for small farmers

5) Bring back & support Food Link Grey Bruce to provide better connections between producers, suppliers and consumers

**Rationale:** to give customers access and generate awareness of what's available and where they can go... good for producers so they know where they can buy product

6) Soil stewardship... grants/education/mentorship. **Rationale:** unique marginal shallow soils here... need to leverage this as a strength.. see Ont Env Commiss Report

7) Initiatives to spend locally, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first. BUY LOCAL

**Rationale:** need to implement local buying in public institutions (hospitals, schools, nursing homes, etc.)

8) Grey County to support all local farmers' markets thru funding, advertising, listings, etc., with extensive collaboration with Ontario Travel/province/OMAFRA

**Rationale:** personal connection to local food (meet the farmer face to face), farmers able to sell direct (best margins), effective use of marketing \$\$ helping producers, story gets told personal

### 3.0 – Expressions of Interest

Number of Contributions: 53

**(1/1) PROJECT: Grey County branding and market the same. Similar to VQA in the wine industry. Website for marketing of Grey County**

(1/2) Suggestion: Joanne Rutherford (see Michele or Kevin Bossi) for graphic design/marketing materials

(1/3) Stewart Halliday

(1/4) Jim Halliday

**(2/1) PROJECT: Research a Grey County processing center.**

(2/2) Steacy Den Haan

(2/3) Paul McQueen

(2/4) Michael Ryan

(2/5) Jason Hayes, Cindy Phillips

(2/6) Rheanna Kish

(2/7) Liza Manning

(2/8) Jim Halliday

(2/9) Axel Meister

**(3/1) PROJECT: Grants - micro granting - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched**

(3/2) Michael Ryan

(3/3) Cindy Phillips

(3/4) Axel Meister

**(4/1) PROJECT: County to make short videos of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China): education, sustainability for agri-tourism**

(4/2) Mark Skinner

(4/3) Ronan Bryson has made some videos for Eat Local Grey Bruce. Bryson Productions.

(4/4) Kelly and Earl Hopkins... WestWind Farms

(4/5) Karen Ferri

**(5/1) PROJECT: Bring back & support Food Link Grey Bruce to provide better connections between producers, suppliers and consumers**

(5/2) Lorraine Irwin

(5/3) Rheanna Kish and Taj Field

(5/4) Kevin and Michele Bossi



**(6/1) PROJECT: Soil stewardship... grants/education/mentorship. Rationale: unique, marginal shallow soils here... need to leverage this as a strength... see Ont Env Commiss Report**

(6/2) Mark Skinner

(6/3) Jason Hayes, Cindy Phillips

(6/4) Leslie Moskovits (possible collaboration with NFU local)

(6/5) Axel Meister

(6/6) Jennifer Bouman

**(7/1) PROJECT: Initiatives to spend locally, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first. BUY LOCAL**

(7/2) Michele Bossi

(7/3) Rheanna Kish and Taj Field

**(8/1) PROJECT: Grey County to support all local farmers' markets thru funding, advertising, listings, etc., with extensive collaboration with Ontario Travel/province/OMAFRA**

(8/2) Rosemary Crick

(8/3) Jim Halliday

(8/4) Kelly and Earl Hopkins WestWind Farms

**(9) Something Else (not included above)**

(9/1) Martha Bouman; for the Grey Local Food Trail

(9/2) Observation: Some of these goals are aimed at changing attitudes, very global. Other objectives seem to be far more concrete and doable in the shorter term. What direction is the County hoping to take?

(9/3) Uber delivery idea - Rheanna Kish

(9/4) Axel Meister

(9/5) Stewart Halliday

## Appendices

### **A – Session Background**

In January and February, Grey County is hosting two public stakeholder meetings to consult with local food producers and food businesses. You are encouraged to attend one of two meetings and share your feedback to help shape a local food strategic plan. This plan will provide insights into the local food industry and help the County create an action plan for supporting local food projects.

Agriculture is one of Grey County's top five sectors. With a concentration of agriculture six times the national average and four times the provincial average, opportunities to further develop the sector need to be explored. Grey County is an agricultural hub and is quickly becoming an agri-culinary destination. Food production, food processing and agri-culinary tourism are essential pieces to the economic health and diversity of the County. Our goal is to look at how food businesses operate with each other and try to find ways to maximize resources and encourage co-operation and partnerships.

**Grey County wants to hear from people all across the local food network:** farmers, food and beverage producers, restaurant and food store owners, distributors, and people involved in community food projects. With all your voices at the table, Grey County can develop effective goals, create targeted projects and build a strong, sustainable local food system.

**For more information on this process, please contact:**

**Erik Lockhart**

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**ph# 613 533-6681**

# GREY COUNTY LOCAL FOOD STRATEGY

**STAKEHOLDER ENGAGEMENT SESSION #2 HIGHLIGHTS**  
**FEBRUARY 13, 2017**  
**REVISION 1**

***Participants:***  
*See participant list*  
*In Association with:*  
**Queen's University Executive Decision Centre**  
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## Executive Summary

Attached are proceedings from a stakeholder meeting held on February 13, 2017 in Owen Sound. The purpose of the workshop was to gather input on a Local Food strategy for Grey County.

The session began with a briefing on the project, previous work, current undertakings, and relevant provincial initiatives. The group brainstormed over 50 potential projects. The group narrowed these down to 13 based on importance, feasibility and potential for County involvement. Individuals then voted on his/her top six projects. The group reviewed these and further discussed the top six by attaching rationale and objectives for each. Finally, participants were asked for expressions of interest on the projects identified.

### Selected Projects

1. **Marketing and branding GC strategy:** Advance the next stage of marketing strategy like the made in grey campaign that was just done. This needs to be outward focused marketing including our Grey County Identity, County Recognition and Brand Awareness -
2. **Farmer education & mentorship:** focused on farm, business and finance skills, food safety. This includes: producer education and marketing & small producer consolidation. Goal is to help move business forward, perhaps assist with certification. This could also involve coaching and mentorship & incubator farm facilitated by the County.
3. **Need processing space:** commercial kitchen and food processing / storage - producing & jarring food for commercial sale. Assistance with over regulation and higher costs of provincial animal processing - loss of kill floors and better access to butcher shops in Grey County.
4. **Source more local food for institutional sales:** Facilitating, promoting, and support access to healthy and local foods in public spaces, health care facilities, educational facilities, etc.
5. **Incubator financing** / Micro grants / funding network -> to support agriculture/food producer businesses
6. **Connect the system // Communication hubs** to connect: 1. buying networks of producers with small stands/small stores 2. recycling opportunities to connect farmers to groups like O'Share and foodbanks. Aim is to connect the system - align partners, producers, distribution, inventory of products/farms/experiences (no coherence, shared vision, coordinated approach, many of us have same problems, but reinventing wheel each time) ... more formal communication system to link farmers/producers with the County
7. **County directory:** need everything in one spot where we can find information, mentorship, counselling, startup, growth assistance etc.

### Editor's Notes:

- a. The symbol // or ... indicates that two similar ideas have been merged together.
- b. This document contains the meeting proceedings and is not intended as a "Final Report"

## 1.0 – Projects and Priorities

What are some potential projects for the next 2-3 years?

The group brainstormed ideas in small teams (1.1). Then each table selected its top 3 ideas to share with the plenary (1.1). Pairs were asked to identify “if we could only advance six projects in the next two years...” (1.2). The plenary discussed and articulated the rationale for the top seven projects (1.3)

### 1.1 - Formulation

1) Marketing and branding GC strategy- Artisanal style of product- next stage of marketing strategy like the made in grey campaign that was just done- outward focused marketing .. Grey County - Identity - County Recognition - Brand Awareness -

Merged ideas:

- 1.1) Grey county branding and marketing: website, promote our products as distinctive
- 1.2) Brand should be Grey-Bruce, not just Bruce, and more than just food. Need a checklist for some standards but avoid the cost of certification.
- 1.3) Sell consumers on value of local food: nutrition, taste, food miles, local jobs, tell the stories.

2) Farmer education & mentorship - on farm, business and finance skills, food safety ...  
 Producer Education & Marketing & small producer consolidation- help to move business forward - assistance with certification ..Coaching and mentorship & incubator farm facilitated by the County.

Merged ideas:

- 2.1) access to information for natural and/or organic farming methods
- 2.2) Invest in a group of experts made available for consultation for support small food entrepreneurs, i.e. Grey County food entrepreneur team

3) PROCESSING SPACE - Commercial kitchen and food processing / storage - producing & jarring food for commercial sale. Assistance with over regulation and higher costs of provincial animal processing - loss of kill floors and better access to butcher shops in Grey County.

Merged ideas:

- 3.1) Investigate ways to enhance processing capacity
- 3.2) Processing centre for Grey County
- 3.3) Support Market access and high quality processing (meat producers) to GTA for ex.
- 3.4) Poultry Processing station - includes egg grading - in Grey County

4) Source more local food for institutional sales. ..Facilitating, promoting, and support access to healthy and local foods in public spaces, health care facilities, educational facilities, etc.

5) Incubator financing / Micro grants / funding network -> to support agriculture/food producer businesses

Merged ideas:

- 5.1) Incubator financing \$10-50,000 to support agriculture/food producer businesses
- 5.2) Strategic Investment into missing links, i.e. food chain, market development, branding, distribution

6) Connect the system // Communication hubs to connect: 1. buying networks of producers with small stands/small stores 2. recycling opportunities to connect farmers to groups like O'Share and foodbanks ..

Merged ideas:

Connect the system - align partners, producers, distribution, inventory of products/farms/experiences (no coherence, shared vision, coordinated approach, many of us have same problems, but reinventing wheel each time) ... more formal communication system to link farmers/producers with the County

7) County directory- everything in one spot where we can find information, mentorship, counselling, startup, growth assistance, etc.

8) highway signage to direct consumers to farm gate sales

9) County Food Festival

10) Advocate and facilitate the need of Local Producers and Regulators, Marketing Boards, and other levels of Government - help us farm as Local Producers not Export Producers. - Advocate for Regulation relief

11) Local Food engagement & literacy: Pilot a community food centre model to allow increased sustainable access to food literacy training, youth engagement, small scale production, and other food initiatives. Possible location: Grey Granite club or another centrally located and vacant space into community food centre/hub - angel investor? \* food security ..

Merged ideas:

ENGAGE people to cook, cooking classes, encouraging cooking at home, marketing through social media, support co-op programs like Georgian College to bring in prospective high school students, crock pot challenge. ...engage youth in the food system

12) Restaurant and tourism thrust: need a mechanism/linkage to promote local food in restaurants ... local food rating system

13) Cross promotion and cooperation ethos

**Ideas that did not make the 1<sup>st</sup> screening:**

Number of Contributions: 76

**(1) Team 1**

- (1/1) High school programs to encourage local food productions/processing
- (1/2) connecting farmers to groups like O'Share and foodbanks that can take advantage before products expire

**(2) Team 2**

- (2/1) Coaching for start up local food business
- (2/2) Local food start up mentorship (No age limit for either role)
- (2/3) Awareness of opportunities to help with business plans
- (2/4) Local food distributor that assists with marketing and distributing-wholesale and perhaps out of region
- (2/5) networking for funding
- (2/6) assistance with business planning to target funding such as angel funding

**(3) Team 3**

- (3/1) Cook offs
- (3/2) egg grading station
- (3/3) extend farm gate to the local farmer's market
- (3/4) Food regulations are burdensome, Diversifying can mean more regs, support Red Tape Challenge
- (3/5) Support more commercial kitchens
- (3/6) Educating people to cook, cooking classes, encouraging cooking at home, crock pot challenge

**(5) Team 5**

- (5/1) get local food into mainstream grocery stores, e.g. This may need subsidies to for local farmers to match the prices of big suppliers
- (5/2) get local food into mainstream grocery stores, e.g. government reserves some space in store for local farmer produce.
- (5/3) Re-educate consumers in cooking from unprocessed ingredients. e.g. home ec in schools, school farm tours tied to food.
- (5/4) A contract system might facilitate local farmers supplying institutions.

**(6) Team 6**

- (6/1) Internship / learning
- (6/2) Inventory of products/farms/experiences
- (6/3) Mentorship programs
- (6/4) Center for chefs and farmers, learn to use products
- (6/5) Cooperatives
- (6/6) Marketing and business finance skills for producers

**(7) Team 7**

- (7/1) Expand use and access to Food Coops
- (7/2) More community gardens
- (7/3) market and promote made in grey brand
- (7/4) reduction of food waste at all levels of food chain
- (7/5) increase affordable access healthy, local foods
- (7/6) create opportunities for food literacy training





**1.2 - Selection**

Item	Pick 6: BEST LOCAL FOOD PRIORITIES IN GREY COUNTY	Average	#votes/20
1	Marketing and branding GC strategy- Artisanal style of product- next stage of marketing strategy like the made in grey campaign that was just done- outward focused marketing .. Grey County - Identity - County Recognition - Brand Awareness -	0.80	16
3	PROCESSING SPACE - Commercial kitchen and food processing / storage - producing & jarring food for commercial sale. Assistance with over regulation and higher costs of provincial animal processing - loss of kill floors and better access to butcher shops in Grey County.	0.75	15
11	Local Food engagement & literacy: Pilot a community food centre model to allow increased sustainable access to food literacy training, youth engagement, small scale production, and other food initiatives. Possible location: Grey Granite club or another centrally located and vacant space into community food centre/hub - angel investor? * food security ..ENGAGE people to cook, cooking classes, encouraging cooking at home, marketing through social media, support co-op programs like Georgian College to bring in prospective high school students, crock pot challenge. ...engage youth in the food system	0.70	14
2	Farmer education & mentorship - on farm, business and finance skills, food safety ... Producer Education & Marketing & small producer consolidation- help to move business forward - assistance with certification ..Coaching and mentorship & incubator farm facilitated by the County.	0.60	12
6	Connect the system // Communication hubs to connect: 1. buying networks of producers with small stands/small stores 2. recycling opportunities to connect farmers to groups like O'Share and foodbanks ...Connect the system - align partners, producers, distribution, inventory of products/farms/experiences (no coherence, shared vision, coordinated approach, many of us have same problems, but reinventing wheel each time) ... more formal communication system to link farmers/producers with the County	0.55	11
5	Incubator financing / Micro grants / funding network -> to support agriculture/food producer businesses	0.50	10
4	Source more local food for institutional sales. ..Facilitating, promoting, and support access to healthy and local foods in public spaces, health care facilities, educational facilities, etc.	0.40	8
7	County directory- everything in one spot where we can find information, mentorship, counselling, startup, growth assistance etc.	0.35	7
9	County Food Festival	0.35	7

10	Advocate and facilitate the need of Local Producers and Regulators, Marketing Boards, and other levels of Government - help us farm as Local Producers not Export Producers. - Advocate for Regulation relief	0.35	7
8	highway signage to direct consumers to farm gate sales	0.20	4
12	Restaurant and tourism thrust: need a mechanism/linkage to promote local food in restaurants ... local food rating system	0.20	4
13	Cross promotion and cooperation ethos	0.05	1

### 1.3 – Development of Rationale and Objectives for top 7

1. Marketing and branding GC strategy- Artisinal style of product- next stage of marketing strategy like the made in grey campaign that was just done- outward focused marketing .. Grey County - Identity - County Recognition - Brand Awareness - could include county directory (what resources exist, )  
**Rationale:** need comms mechanisms to generate awareness and pull the audience ... unifies the group around a common "brand"
2. Processing space: Commercial kitchen and food processing / storage - producing & jarring food for commercial sale. Assistance with over regulation and higher costs of provincial animal processing - loss of kill floors and better access to butcher shops in Grey County. \*  
**Rationale:** opportunity to value add...need volume and capacity... if you can't kill it, you can't eat it ... quota system gets in way
3. Local Food engagement & literacy: Pilot a community food centre model to allow increased sustainable access to food literacy training, youth engagement, small scale production, and other food initiatives. Possible location: Grey Granite club or another centrally located and vacant space into community food centre/hub - angel investor? \* food security ..ENGAGE people to cook, cooking classes, encouraging cooking at home, marketing through social media, support co-op programs like Georgian College to bring in prospective high school students, crock pot challenge. ...engage youth in the food system  
**Rationale:** demand pull... creating a consumer group.. build sustainability for long term .. enables us to be able to compete against big boys
4. Farmer education & mentorship - on farm, business and finance skills, food safety ... Producer Education & Marketing & small producer consolidation- help to move business forward - assistance with certification ..Coaching and mentorship & incubator farm facilitated by the County.  
**Rationale:** to ensure long term sustainability from financial, professional, environmental angles ... succession planning
5. Connect the system // Communication hubs to connect: 1. buying networks of producers with small stands/small stores 2. recycling opportunities to connect farmers to groups like O'Share and foodbanks ...Connect the system - align partners, producers, distribution, inventory of products/farms/experiences ... more formal communication system to link farmers/producers with the County  
**Rationale:** no coherence, shared vision, coordinated approach, many of us have same problems, but reinventing wheel each time) ... increases awareness / so much out there that we don't know about ... no mechanism to finance low profit infrastructure
6. Incubator financing / Micro grants / funding network -> to support agriculture/food producer businesses  
**Rationale:** need capital. need to pay bills... need that extra push to get us over the top... "slow \$" not a favourite from traditional lenders
7. Source more local food for institutional sales. ..Facilitating, promoting, and support access to healthy and local foods in public spaces, health care facilities, educational facilities, etc.  
**Rationale:**

## 2.0 – Expressions of Interest

**Priority:** Marketing and branding GC strategy- Artisanal style of product- next stage of marketing strategy like the made in grey campaign that was just done- outward focused marketing ... Grey County - Identity - County Recognition - Brand Awareness - could include county directory (what resources exist, )

**Rationale:** need comms mechanisms to generate awareness and pull the audience ... unifies the group around a common "brand"

### Groups / individuals interested in this priority:

- (1/2) Cindy Wilhelm
- (1/3) Eat Local grey Bruce (Distribution co-op)
- (1/4) Paul MacDonald (Lawson's)----branding
- (1/5) Anne Clark (Process Mapping)
- (1/6) Advice to the team... focus on activity that are near term and have ready impacts to the existing grey county Farmer
- (1/7) marketing and branding Hugh
- (1/8) ALUS
- (1/9) Sarah McNulty Comrie

**Priority:** Processing Space - Commercial kitchen and food processing / storage - producing & jarring food for commercial sale. Assistance with over regulation and higher costs of provincial animal processing - loss of kill floors and better access to butcher shops in Grey County. \*

**Rationale:** opportunity to value add... need volume and capacity... if you can't kill it, you can't eat it ... quota system gets in way

### Groups / individuals interested in this priority:

- (2/2) Cindy & Mike Wilhelm
- (2/3) Eat Local grey Bruce (Distribution co-op)
- (2/4) contact Toronto Food Starter
- (2/5) Al Taylor, Country Meadow Meats
- (2/6) Drew McIver, Champions of Butter - dairy specific processing support
- (2/7) Gerald te Velde

**Priority:** Local Food engagement & literacy: Pilot a community food centre model to allow increased sustainable access to food literacy training, youth engagement, small scale production, and other food initiatives. Possible location: Grey Granite club or another centrally located and vacant space into community food centre/hub - angel investor? \* food security ...ENGAGE people to cook, cooking classes, encouraging cooking at home, marketing through social media, support co-op programs like Georgian College to bring in prospective high school students, crock pot challenge. ...engage youth in the food system

**Rationale:** demand pull... creating a consumer group... build sustainability for long term .. enables us to be able to compete against big boys

### Groups / individuals interested in this priority:

- (3/2) Grey Bruce Health Unit
- (3/3) Food Security Action Group/Poverty Task Force
- (3/4) Georgian College

**Priority:** Farmer education & mentorship - on farm, business and finance skills, food safety ... Producer Education & Marketing & small producer consolidation- help to move business forward - assistance with certification ..Coaching and mentorship & incubator farm facilitated by the County.

**Rationale:** to ensure long term sustainability from financial, professional, environmental angles ... succession planning

Groups / individuals interested in this priority:

- (4/2) Cindy & Mike Wilhelm
- (4/3) Food Safety - Health Unit
- (4/4) Kristine Hammel, CRAFT farmer
- (4/5) Adam Lesperance Lamblicious

**Priority:** Connect the system // Communication hubs to connect: 1. buying networks of producers with small stands/small stores 2. recycling opportunities to connect farmers to groups like O'Share and foodbanks ..Connect the system - align partners, producers, distribution, inventory of products/farms/experiences ... more formal communication system to link farmers/producers with the County

**Rationale:** no coherence, shared vision, coordinated approach, many of us have same problems, but reinventing wheel each time) ... increases awareness / so much out there that we don't know about ... no mechanism to finance low profit infrastructure

Groups / individuals interested in this priority:

- (5/2) Food Security Action Group/Poverty Task Force
- (5/3) Eat Local grey Bruce (Distribution co-op)
- (5/4) Lamblicious (Local food store)

**Priority::** Incubator financing / Micro grants / funding network -> to support agriculture/food producer businesses

**Rationale:** need capital. need to pay bills.. need that extra push to get us over the top... "slow \$" not a favourite from traditional lenders

Groups / individuals interested in this priority:

- (6/2) Anita DeJong
- (6/3) Eat Local Grey Bruce Coop

**Priority:** Source more local food for institutional sales. ...Facilitating, promoting, and support access to healthy and local foods in public spaces, health care facilities, educational facilities, etc.

Groups / individuals interested in this priority:

- (7/2) Grey Bruce Health Unit

**Something Else (not included above) or advice you have for the project team *and closing questions***

- 1) Insure projects, funding, etc. that are given resources meet some feasibility requirements. If they are not feasible this may need to be published so it is understood why they are not a county priority.
- 2) County food festival- Lynn Freeman, Candice and Harley, Geoff Derry
- 3) would suggest a monthly newsletter \* there will be a food section in our new newsletter
- 4) When will you take this to Council? April
- 5) Financing seemed pretty important tonight... how committed is the County to put their \$ where their mouth is re: local food
- 6) We need to pull together in this new election cycle with a coherent message to politicians-> e.g. Grey County Federation of Agriculture

## Appendices

### **A – Session Background**

In January and February, Grey County is hosting two public stakeholder meetings to consult with local food producers and food businesses. You are encouraged to attend one of two meetings and share your feedback to help shape a local food strategic plan. This plan will provide insights into the local food industry and help the County create an action plan for supporting local food projects.

Agriculture is one of Grey County's top five sectors. With a concentration of agriculture six times the national average and four times the provincial average, opportunities to further develop the sector need to be explored. Grey County is an agricultural hub and is quickly becoming an agri-culinary destination. Food production, food processing and agri-culinary tourism are essential pieces to the economic health and diversity of the County. Our goal is to look at how food businesses operate with each other and try to find ways to maximize resources and encourage co-operation and partnerships.

**Grey County wants to hear from people all across the local food network:** farmers, food and beverage producers, restaurant and food store owners, distributors, and people involved in community food projects. With all your voices at the table, Grey County can develop effective goals, create targeted projects and build a strong, sustainable local food system.



## **B – Session #1 Highlights (Jan 18, 2017)**

Below are highlights from a stakeholder meeting held on January 18, 2017 in Flesherton. The purpose of the workshop was to gather input on a Local Food strategy for Grey County.

The session began with a briefing on the project, previous work, current undertakings, and relevant provincial initiatives. The group then reviewed and ranked six local food priorities from 2014. The group brainstormed over 60 potential new projects. The group narrowed these down to 15 based on importance, feasibility and potential for County involvement. Individuals then voted on his/her top six projects. The group reviewed these and further discussed the top eight by attaching rationale and objectives for each. Finally, participants were asked for expressions of interest on the projects identified.

### **Selected Projects**

1. Grey County **branding and market** the same. Similar to VQA in the wine industry. Website for marketing of Grey County
2. Research a **Grey County processing center**.
3. **Grants - micro granting** - lenders, pool of money/funding opportunities, simple, easy application process, seed funding for projects through community co-operative (businesses) pot for seed projects - county matched ..
4. County to make **short videos** of a variety of local food producers for use on social media: Videos could be used to compare local food to imported food (apples from Grey vs apples from China) : education, sustainability for agri-tourism
5. Bring back & **support Food Link Grey Bruce** to provide better connections between producers, suppliers and consumers
6. **Soil stewardship**... grants/education/mentorship
7. Initiatives **to spend locally**, help change shopping patterns - ...All Grey County facilities implement a policy to purchase from Grey producers first.
8. Grey County to support all **local farmers' markets** thru funding, advertising, listings, etc. with extensive collaboration with Ontario Travel/province/OMAFRA

## **C – Process Overview**

The stakeholder engagements were conducted using an electronic meeting system (EMS), an innovative facilitation process developed from research at the Queen's School of Business. The Queen's EMS, called "the Decision Centre", combines expert facilitation with a state of the art group decision support system to enable groups to rapidly accelerate idea generation and consensus building. This facility consists of a network of laptops accessing software designed to support idea generation, idea consolidation, idea evaluation and planning. The tool supports, but does not replace, verbal interaction; typically 25% of interaction takes place on the computers. Feedback from groups who have used the Executive Decision Centre process includes: meeting times can be cut in half; participation goes way up; better idea generation and alternative evaluation; a more structured process; and automatic documentation of deliberations.

Over 500 organizations around North America use the Centre for meetings such as: strategic planning, visioning, annual planning, focus groups, team building, budgeting, program review, project planning, risk assessment, job profiling, 360 degree feedback, alternative evaluation, new product development and a variety of other meeting types.

In the session, participants were asked, for example, "What are some potential local food projects for Grey County in the next three years?" Participants typed in ideas on the laptops all of which appeared on a public screen at the front of the room. These ideas were then discussed and categorized into common themes. The group was then asked "if we could only address six of these in the next two years, which ones are most critical?" Individuals selected his/her top six and the overall results were then displayed to the group and further discussed.

**For more information on this process, please contact:**

**Erik Lockhart**

**[lockhare@queensu.ca](mailto:lockhare@queensu.ca)**

**ph# 613 533-6681**

**Survey Questionnaire**



- 1) What is your role (or roles) in the local food economy? Check all that apply
  - Consumer
  - Primary producer
  - Processor (e.g.: abattoir/butcher, canner, brewer and winemaker)
  - Distributor (marketing, transportation, sourcing of local foods)
  - Business Incubator or support (business support organization, lender, shared kitchen facility, etc.)
  - Change agent (policy maker, non-profit, educator, researcher, innovative farmer, entrepreneur, grassroots volunteer)
  - Other
  
- 2) What are your top 3 reasons for participating in or supporting the local food system?
  - I make my living in the local food sector
  - Food Security
  - Sustainable practices/Environment concerns
  - Reduced food miles
  - Health/nutrition
  - Support local growers/economy
  - Freshness and quality
  - Relationships with producers
  - Farm-to-plate traceability
  - Philosophy
  - Other:
  
- 3) If you purchased local food in the last 6 months, where did you purchase it? Check all that apply
  - Large chain grocery store
  - Local grocery store
  - Farm gate sale
  - Community Supported Agriculture (CSA) membership
  - Eat Local Grey Bruce co/op
  - Health food store
  - Farmers' market
  - Restaurant
  - Local supplier / food buying club or other order and delivery service
  - Specialty / gourmet food store
  - Other:

- 4) If you purchased local food in the last 6 months, check which of the following did you purchased. Check all that apply:

Fruits/Vegetables  
Meat/Poultry/Fish  
Dairy products  
Maple syrup/honey  
Prepared Foods from local ingredients  
Eggs  
Grains and Pulses  
Herbs/spices/teas  
Locally produced “exotics” (Coffee, chocolate, etc.)  
Other:

- 5) Which of these organizations do you see the most value in?

- Grey Bruce Ag & Culinary Association
- Grey County Fed of Ag
- Eat Local Grey Bruce coop
- National Farmers Union Local 344
- Culinary Tourism Alliance / Feast ON
- Foodland Ontario
- OntarioFresh (Greenbelt)
- Alternative Land Use Services
- Ontario Forage Council / Ontario Soil & Crop
- Food Security Action Group
- Sustain Ontario
- Georgian College Food Entrepreneurship
- Organic Council of Ontario
- Ecological Farmers of Ontario
- Apple Pie Trail
- Saints & Sinners Trail
- Ontario Craft Brewers/Ontario Craft Cider/Wine Country Ontario VQA
- 4H
- Other

- 6) Please rank the following questions from 1-5 (1 = strongly agree, 3 = impartial and 5 = strongly disagree)

The County has a role to play in supporting local food businesses.

Municipal governments (County and Local) should promote buying locally grown food.

I find it difficult to know whether food is locally-sourced or not at the grocery stores.

I would order more locally produced foods in restaurants if the menu items were clearly marked as locally grown.

I am willing to pay more for food that is locally produced.

- 7) Please rank the following list of 11 previously identified opportunities in order of preference, with #1 being your most important.
- Cluster Development and Support
  - Strategic Alignment with Provincial Projects/Initiatives outlined in the Local Food Act
  - Research into the development of a Food Hub for processing and distribution
  - Closer alignment with Tourism Initiatives
  - Micro Granting for new or existing small businesses
  - Development of a stand-alone brand for Grey County
  - Initiatives to encourage local spending
  - Procurement policy for Grey County facilities
  - Support to local farmers' markets
  - Development of a strong web presence to connect businesses to consumers and each other
  - Support for soil stewardship
- 8) Please explain why you have chosen your top 5 priorities above.
- 9) Do you have an additional ideas to fill the gaps within Grey County Local food value chain?
- 10) Is there any initiative you have seen succeed in another area that you think has potential to create opportunity for local food in Grey? What and where is it?
- 11) Is there anything else you'd like to add? Please share any thoughts that have not been captured in the questions above. This is your chance to think outside the box... (but write it in the box).
- 12) Please include your contact information if you would like a response about anything in particular (see below). Your information will not be shared with anyone outside the project team (Planscape and Grey County Economic Development).





## APPENDIX 4

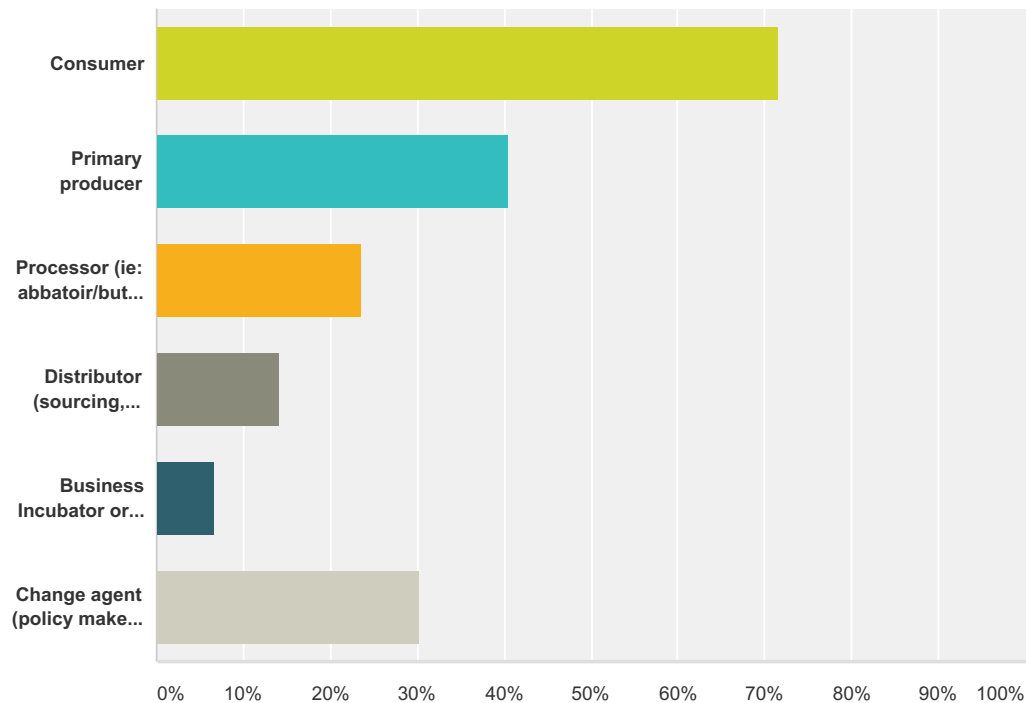
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### Survey Answers



## Q1 What is your role (or roles) in the local food economy? Check all that apply:

Answered: 106 Skipped: 5



Answer Choices	Responses	
Consumer	71.70%	76
Primary producer	40.57%	43
Processor (ie: abbatoir/butcher, canner, brewer, baker)	23.58%	25
Distributor (sourcing, transportation, marketing)	14.15%	15
Business Incubator or support (business support organization, lender, shared kitchen facility etc.)	6.60%	7
Change agent (policy maker, non-profit, educator, researcher, innovative farmer, entrepreneur, grassroots volunteer)	30.19%	32
<b>Total Respondents: 106</b>		

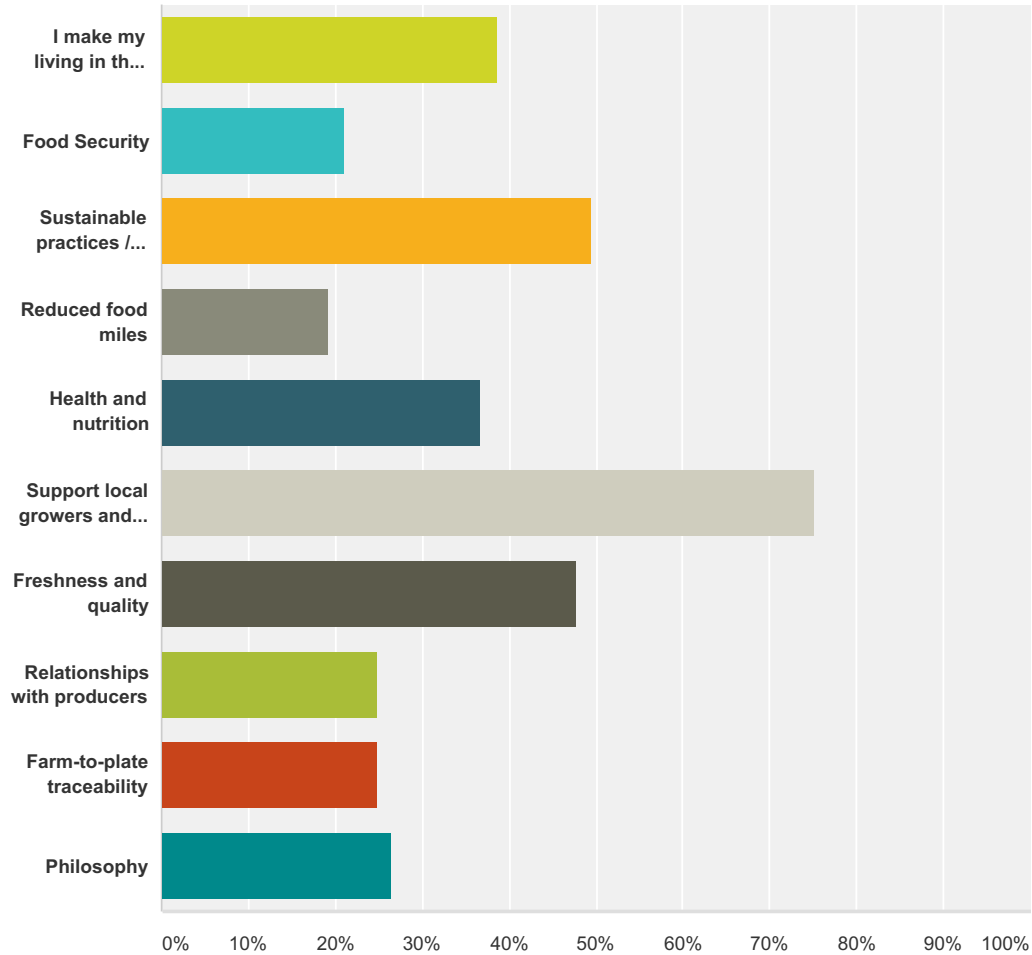
#	Other (please specify)	Date
1	none yet, but marketing is the goal	3/3/2017 3:33 PM
2	Hope to sell local honey this year	3/3/2017 6:26 AM
3	market manager	2/27/2017 3:58 PM
4	restaurant	2/27/2017 3:31 PM
5	cafe	2/27/2017 3:16 PM
6	Consultant	2/27/2017 2:03 PM
7	Budding food entrepreneur	2/25/2017 7:51 PM
8	Municipal elected official	2/23/2017 7:19 PM

## Local Food Strategic Plan for Grey County

9	RTO	2/23/2017 8:33 AM
10	Restaurant	2/16/2017 12:43 PM
11	Chef	2/16/2017 11:48 AM
12	not for profit farmers market	2/10/2017 6:39 PM
13	Restaurant Owner	2/10/2017 5:50 PM

## Q2 What are your top 3 reasons for participating in or supporting the local food system?

Answered: 109 Skipped: 2



Answer Choices	Responses
I make my living in the local food sector	38.53% 42
Food Security	21.10% 23
Sustainable practices / Environment concerns	49.54% 54
Reduced food miles	19.27% 21
Health and nutrition	36.70% 40
Support local growers and economy	75.23% 82
Freshness and quality	47.71% 52
Relationships with producers	24.77% 27
Farm-to-plate traceability	24.77% 27
Philosophy	26.61% 29

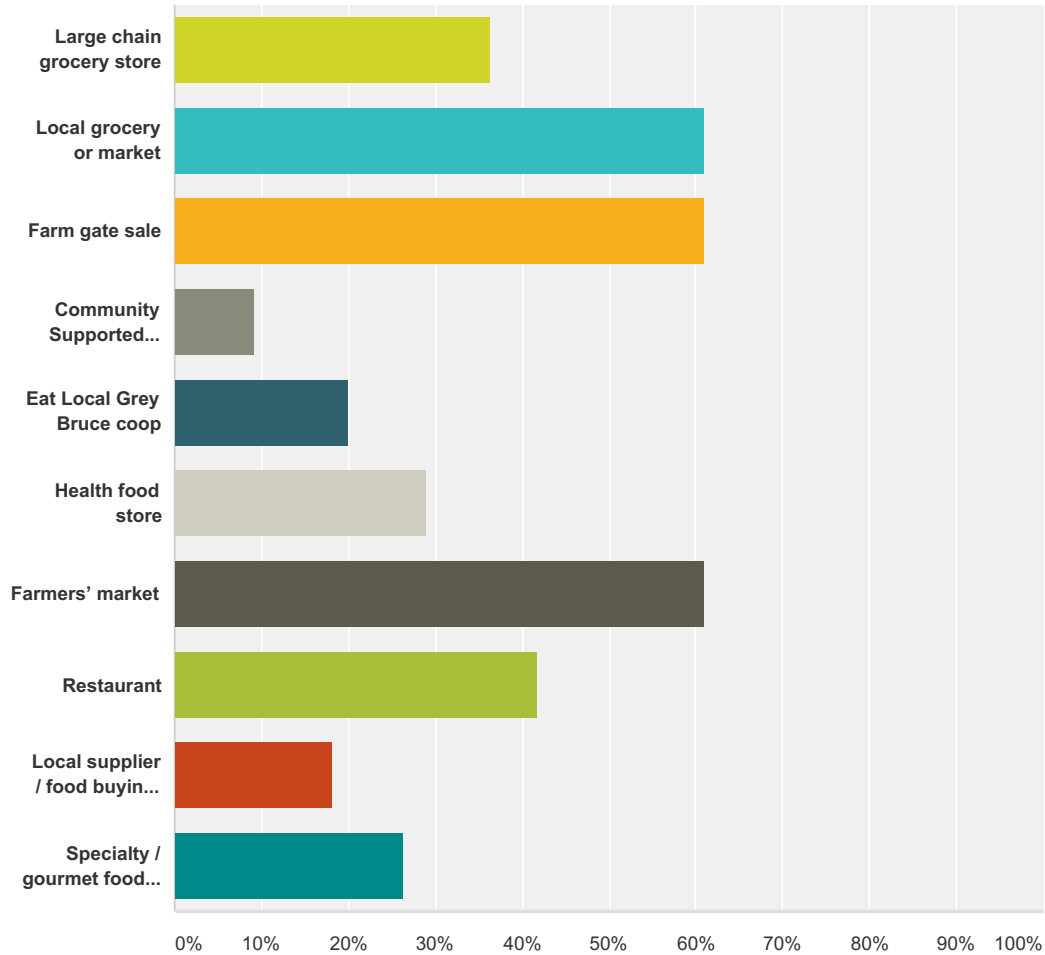
## Local Food Strategic Plan for Grey County

Total Respondents: 109

#	Other (please specify)	Date
1	Need for radical shift in agricultural practices away from industrial model	2/27/2017 2:24 PM
2	Make healthy food accessible to all in the community	2/23/2017 8:32 PM
3	Tourism opportunities to connect people to their food	2/23/2017 8:33 AM
4	Distrust of the purity, cleanliness and parts per million of harmful chemicals.	2/16/2017 5:26 PM
5	Profitability	2/13/2017 7:07 AM
6	support restaurants	2/10/2017 5:54 PM

**Q3 If you purchased local food in the last 6 months, where did you purchase it? Check all that apply:**

Answered: 110 Skipped: 1



Answer Choices	Responses
Large chain grocery store	36.36% 40
Local grocery or market	60.91% 67
Farm gate sale	60.91% 67
Community Supported Agriculture (CSA) membership	9.09% 10
Eat Local Grey Bruce coop	20.00% 22
Health food store	29.09% 32
Farmers' market	60.91% 67
Restaurant	41.82% 46
Local supplier / food buying club or other order and delivery service	18.18% 20
Specialty / gourmet food store	26.36% 29

## Local Food Strategic Plan for Grey County

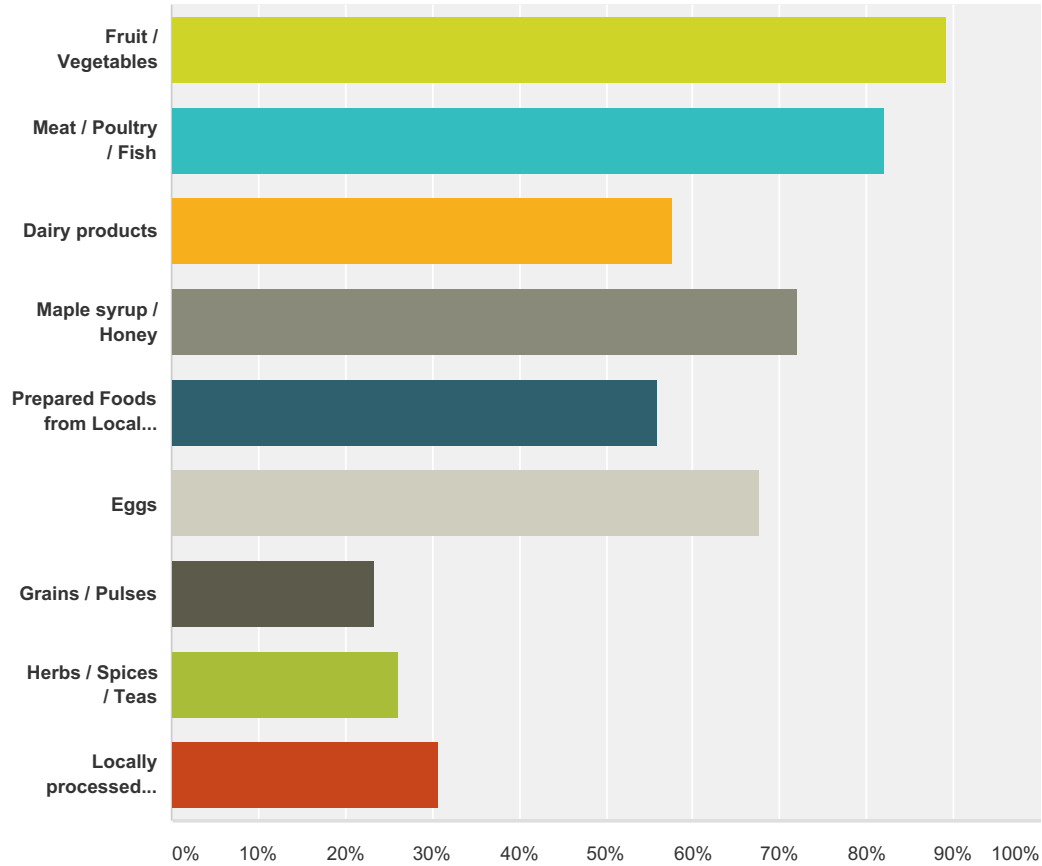
Total Respondents: 110

#	Other (please specify)	Date
1	my local food coop in Muskoka	3/3/2017 3:33 PM
2	local independent butcher - Premium Beef	2/24/2017 10:35 AM
3	craft show	2/23/2017 9:32 AM
4	Butcher Shop	2/16/2017 5:26 PM
5	Direct from Farmer	2/10/2017 5:50 PM



**Q4 If you purchased local food in the last 6 months, check which of the following you purchased. Check all that apply:**

Answered: 111 Skipped: 0



Answer Choices	Responses
Fruit / Vegetables	89.19% 99
Meat / Poultry / Fish	81.98% 91
Dairy products	57.66% 64
Maple syrup / Honey	72.07% 80
Prepared Foods from Local Ingredients	55.86% 62
Eggs	67.57% 75
Grains / Pulses	23.42% 26
Herbs / Spices / Teas	26.13% 29
Locally processed "exotics" (coffee, chocolate etc.)	30.63% 34
<b>Total Respondents: 111</b>	

#	Other (please specify)	Date
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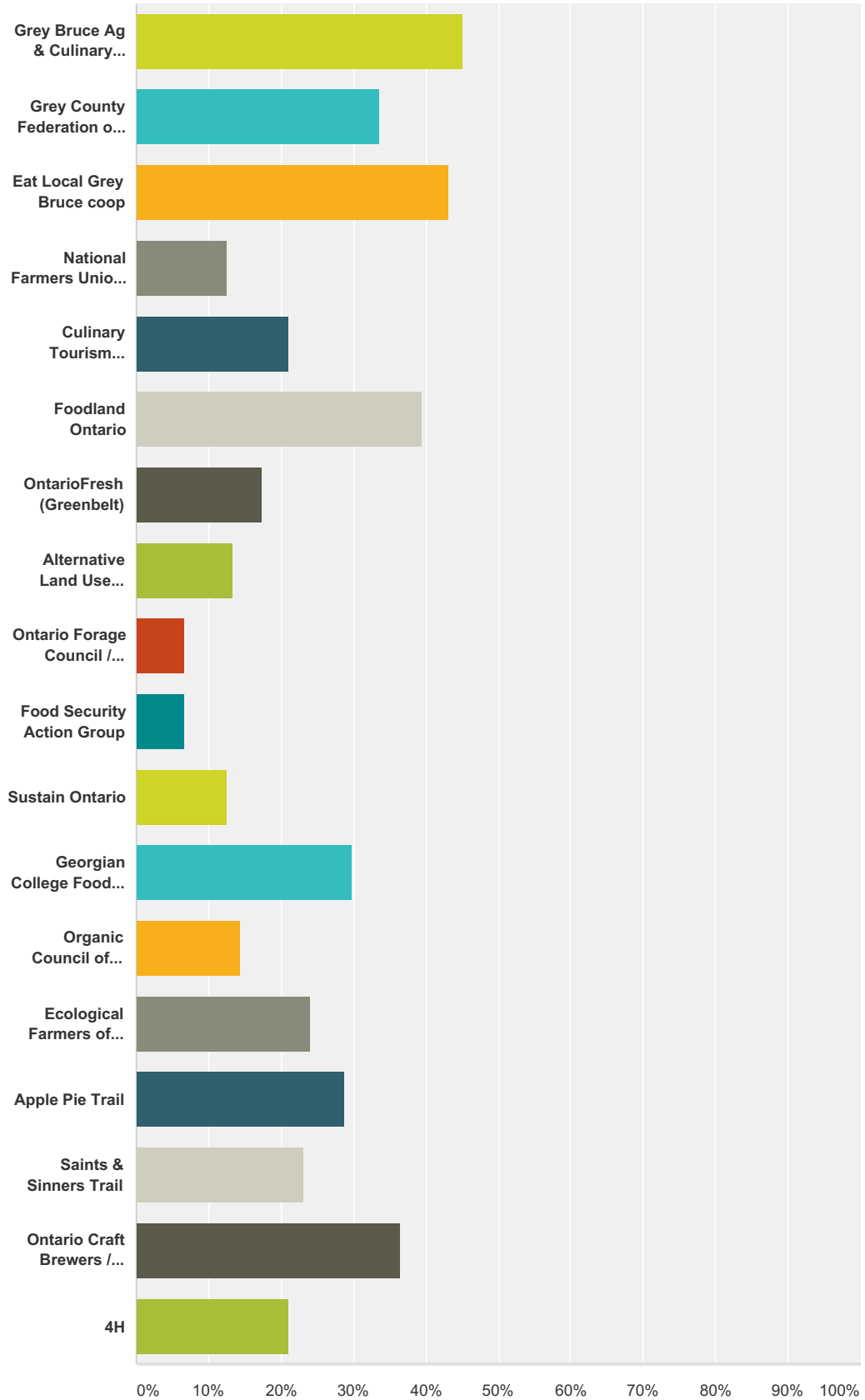
## Local Food Strategic Plan for Grey County

1	Wine and cider	2/27/2017 3:38 PM
2	Garlic	2/23/2017 5:45 PM
3	mushrooms	2/16/2017 5:26 PM
4	bread	2/11/2017 1:12 PM
5	What are pulses?	2/10/2017 5:54 PM

**Q5 Which of these organizations do you see the most value in?**

Answered: 104 Skipped: 7

## Local Food Strategic Plan for Grey County



Answer Choices	Responses
Grey Bruce Ag & Culinary Association	45.19% 47

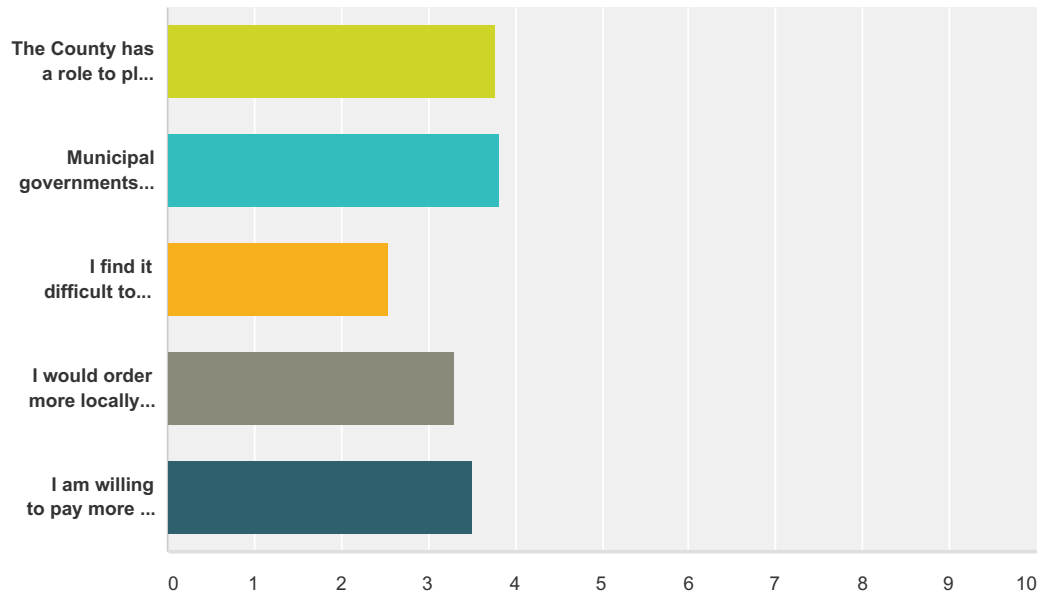
## Local Food Strategic Plan for Grey County

Grey County Federation of Agriculture	33.65%	35
Eat Local Grey Bruce coop	43.27%	45
National Farmers Union Local 344	12.50%	13
Culinary Tourism Alliance / Feast ON	21.15%	22
Foodland Ontario	39.42%	41
OntarioFresh (Greenbelt)	17.31%	18
Alternative Land Use Services	13.46%	14
Ontario Forage Council / Ontario Soil & Crop	6.73%	7
Food Security Action Group	6.73%	7
Sustain Ontario	12.50%	13
Georgian College Food Entrepreneurship	29.81%	31
Organic Council of Ontario	14.42%	15
Ecological Farmers of Ontario	24.04%	25
Apple Pie Trail	28.85%	30
Saints & Sinners Trail	23.08%	24
Ontario Craft Brewers / Ontario Craft Cider / Wine Country Ontario - VQA	36.54%	38
4H	21.15%	22
<b>Total Respondents: 104</b>		

#	Other (please specify)	Date
1	not that familiar with local scene yet	3/3/2017 3:33 PM
2	Biodynamic Society of Ontario	2/27/2017 3:58 PM
3	don't know these	2/27/2017 3:31 PM
4	CMHA Food Forest/Garden Program	2/23/2017 8:32 PM
5	Regarding the question below, it will not let me pick #3 on the remaining questions, that would be my rank on all questions left blank	2/23/2017 9:17 AM
6	I am unfamiliar with these organizations.	2/16/2017 5:26 PM
7	Ontario Farm Fresh Marketing Association	2/15/2017 6:46 PM
8	I am not familiar with many of these. I find value in hard work. Most of my sales go through the local farmers' markets and bulk sales to other producers. I have enough work to do with that. my customer base is growing without adding our name to any map or other organization.	2/15/2017 7:29 AM
9	CRAFT Southwest Ontario (apprentice network)	2/11/2017 6:25 AM
10	Butter Tarts & Buggies (left out again)	2/10/2017 5:54 PM

**Q6 Please rank the following questions from 1-5 (1 = strongly agree, 3 = impartial and 5 = strongly disagree)**

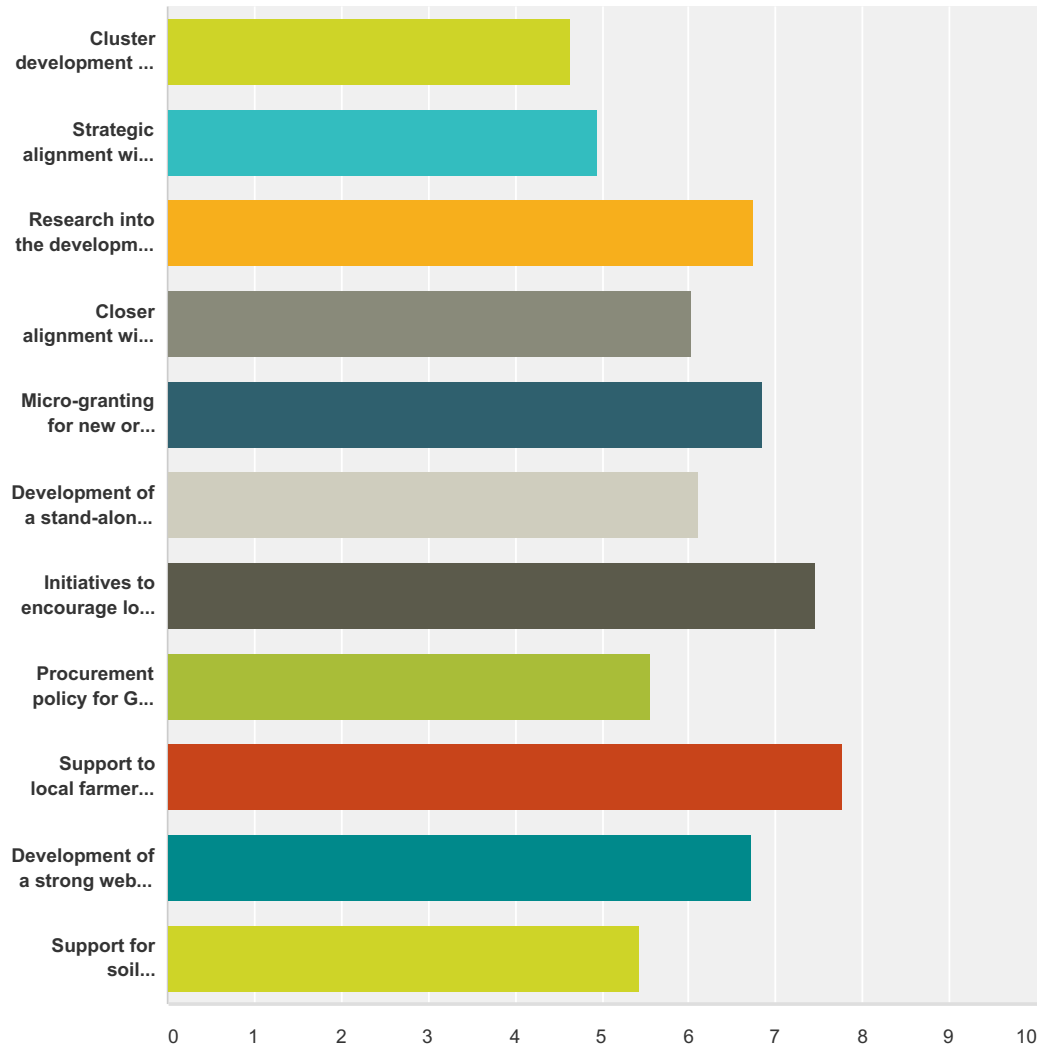
Answered: 111 Skipped: 0



	1	2	3	4	5	Total	Score
The County has a role to play in supporting local food businesses.	40.00% 14	25.71% 9	17.14% 6	5.71% 2	11.43% 4	35	3.77
Municipal governments (County and Local) should promote buying locally grown food.	41.82% 23	23.64% 13	16.36% 9	10.91% 6	7.27% 4	55	3.82
I find it difficult to know whether food is locally-sourced or not at the grocery stores.	6.15% 4	16.92% 11	29.23% 19	21.54% 14	26.15% 17	65	2.55
I would order more locally produced foods in restaurants if the menu items were clearly marked as locally grown.	29.58% 21	19.72% 14	15.49% 11	21.13% 15	14.08% 10	71	3.30
I am willing to pay more for food that is locally produced.	28.16% 29	25.24% 26	25.24% 26	12.62% 13	8.74% 9	103	3.51

**Q7 Please rank the following list of 11 previously identified opportunities in order of preference, with #1 being your most important.**

Answered: 93 Skipped: 18



	1	2	3	4	5	6	7	8	9	10	11	Total	Score
Cluster development and support to specific sectors	4.94% 4	8.64% 7	1.23% 1	7.41% 6	6.17% 5	3.70% 3	9.88% 8	13.58% 11	11.11% 9	16.05% 13	17.28% 14	81	4.63

## Local Food Strategic Plan for Grey County

Strategic alignment with provincial projects / Initiatives outlined in the Local Food Act	<b>1.28%</b> 1	<b>7.69%</b> 6	<b>5.13%</b> 4	<b>3.85%</b> 3	<b>12.82%</b> 10	<b>11.54%</b> 9	<b>3.85%</b> 3	<b>15.38%</b> 12	<b>19.23%</b> 15	<b>8.97%</b> 7	<b>10.26%</b> 8	78	4.94
Research into the development of a food hub for processing and distribution	<b>12.66%</b> 10	<b>13.92%</b> 11	<b>15.19%</b> 12	<b>3.80%</b> 3	<b>8.86%</b> 7	<b>6.33%</b> 5	<b>10.13%</b> 8	<b>10.13%</b> 8	<b>6.33%</b> 5	<b>6.33%</b> 5	<b>6.33%</b> 5	79	6.75
Closer alignment with tourism initiatives	<b>7.59%</b> 6	<b>10.13%</b> 8	<b>6.33%</b> 5	<b>10.13%</b> 8	<b>12.66%</b> 10	<b>12.66%</b> 10	<b>3.80%</b> 3	<b>8.86%</b> 7	<b>7.59%</b> 6	<b>17.72%</b> 14	<b>2.53%</b> 2	79	6.03
Micro-granting for new or existing small businesses	<b>15.29%</b> 13	<b>14.12%</b> 12	<b>4.71%</b> 4	<b>12.94%</b> 11	<b>7.06%</b> 6	<b>9.41%</b> 8	<b>12.94%</b> 11	<b>8.24%</b> 7	<b>2.35%</b> 2	<b>5.88%</b> 5	<b>7.06%</b> 6	85	6.85
Development of a stand-alone local food brand for Grey County	<b>9.76%</b> 8	<b>9.76%</b> 8	<b>9.76%</b> 8	<b>14.63%</b> 12	<b>7.32%</b> 6	<b>8.54%</b> 7	<b>6.10%</b> 5	<b>4.88%</b> 4	<b>7.32%</b> 6	<b>6.10%</b> 5	<b>15.85%</b> 13	82	6.12
Initiatives to encourage local spending	<b>14.63%</b> 12	<b>10.98%</b> 9	<b>18.29%</b> 15	<b>7.32%</b> 6	<b>12.20%</b> 10	<b>10.98%</b> 9	<b>12.20%</b> 10	<b>6.10%</b> 5	<b>2.44%</b> 2	<b>2.44%</b> 2	<b>2.44%</b> 2	82	7.45
Procurement policy for Grey County facilities	<b>5.88%</b> 5	<b>5.88%</b> 5	<b>5.88%</b> 5	<b>11.76%</b> 10	<b>4.71%</b> 4	<b>12.94%</b> 11	<b>11.76%</b> 10	<b>14.12%</b> 12	<b>11.76%</b> 10	<b>9.41%</b> 8	<b>5.88%</b> 5	85	5.56
Support to local farmers' markets	<b>20.45%</b> 18	<b>11.36%</b> 10	<b>15.91%</b> 14	<b>9.09%</b> 8	<b>13.64%</b> 12	<b>7.95%</b> 7	<b>7.95%</b> 7	<b>4.55%</b> 4	<b>4.55%</b> 4	<b>3.41%</b> 3	<b>1.14%</b> 1	88	7.77
Development of a strong web presence to connect businesses to consumers and each other	<b>8.24%</b> 7	<b>9.41%</b> 8	<b>15.29%</b> 13	<b>15.29%</b> 13	<b>9.41%</b> 8	<b>7.06%</b> 6	<b>10.59%</b> 9	<b>5.88%</b> 5	<b>10.59%</b> 9	<b>3.53%</b> 3	<b>4.71%</b> 4	85	6.73
Support for soil stewardship	<b>9.30%</b> 8	<b>8.14%</b> 7	<b>8.14%</b> 7	<b>6.98%</b> 6	<b>8.14%</b> 7	<b>8.14%</b> 7	<b>6.98%</b> 6	<b>4.65%</b> 4	<b>8.14%</b> 7	<b>13.95%</b> 12	<b>17.44%</b> 15	86	5.42



## Local Food Strategic Plan for Grey County

### Q8 Please explain why you have chosen your top 5 priorities above.

Answered: 61 Skipped: 50

#	Responses	Date
1	Not sure i'm well enough researched on all these projects but the foundation is the soil and ability of one to farm it and produce a product. The rest comes after	3/3/2017 3:46 PM
2	Makes sense to me	3/3/2017 2:19 AM
3	I think we need to keep the food we eat as local as we can. but also like organic as possible	3/2/2017 8:53 PM
4	Focus on benefit to local food initiatives	3/2/2017 1:14 PM
5	Very local initiatives create long term sustainability. Times are getting tougher, and I think it would be better to have more folks involved with their own food production, storage and distribution. No one should go hungry in our communities!	2/28/2017 10:55 AM
6	We need to inform farmer on how to maintain and regenerate land while supporting them with processing facilities and allow for local people access to these goods.	2/27/2017 7:30 PM
7	Focus is on development and support for food producers, and enable them to reach a broader audience/market	2/27/2017 5:47 PM
8	Most easily attainable results.	2/27/2017 5:31 PM
9	Local farmers markets already exist and can use your support, 2. quick to implement and supports your own initiative. 3. Local food brand would help to market outside our area within Ontario. 4. web presence makes sense. 5. Encouraging local spending helps build community and I believe local is the wave of the future.	2/27/2017 5:04 PM
10	Believe in developing one central location/destination for both locals and tourists to enjoy Grey's Food experience	2/27/2017 3:59 PM
11	no idea what byou are talking about	2/27/2017 3:32 PM
12	supporting farmers to stay local, produce, process and distribute.	2/27/2017 3:29 PM
13	local Producers need local consumers to be aware and educated, distribution to outside outlets is okay, but they should have their local sources as well.	2/27/2017 3:25 PM
14	Greatest on the ground impacts	2/27/2017 3:03 PM
15	I think that the development of a standalone Grey brand will be a catalyst for many other activities. I believe the market is primarily outside of Grey (tourism high and local spending low on priority) with the exception of local procurement: where institutions can become major supporters and ambassadors.	2/27/2017 2:37 PM
16	Most viable propositions	2/27/2017 2:10 PM
17	impact on local economy	2/27/2017 2:06 PM
18	I think it's important to use the most natural approach possible and to make that choice more attainable for local growers and consumers	2/27/2017 1:47 PM
19	Support local	2/25/2017 8:51 PM
20	I am a budding food entrepreneur who plans to make products in Grey County that feature local food, so my focus right now is primarily on areas that will support new local food businesses. I see value in all of the items listed, really!	2/25/2017 8:11 PM
21	Network needed between producers, processors and consumers. Support of local economy, personal health and environment. Taking advantage of local landscape and diversity.	2/25/2017 12:53 PM
22	The county should lead by example - so local food procurement should be tops. Soil stewardship extremely important to growing good food/taking care of environment.	2/24/2017 10:39 AM
23	General business experience	2/23/2017 7:26 PM
24	ec development is growing in Grey and the online presence is spreading the word. There needs to be easy and smarter ways to connect for the purchaser.	2/23/2017 4:17 PM

## Local Food Strategic Plan for Grey County

25	Priorities are: local procurement, local spending initiatives (make buying local food a little less costly for the consumer), local food hub (to reduce overall costs and make food more available for consumers, retailers and restaurants). Micro-granting also important. I think farmer's markets and alignment with tourism is also very important but think the county is already doing a good job with that.	2/23/2017 10:23 AM
26	Need to get people working together The market is not large enough for just Grey County, so need to take advantage of the tourism opportunities	2/23/2017 8:53 AM
27	A direct ecological local food initiative tied to micro financing would encourage more small scale production and could assist to expand existing activities. Branding tied to this approach would have broad appeal.	2/23/2017 7:36 AM
28	The centre could directly benefit from those priorities for our commercial learning kitchen	2/21/2017 4:12 PM
29	In searching out local foods I have met and spoken to many small scale farmers and businesses who struggle to expand. Demand is there but the money and encouragement isn't. Sometimes as little as \$100 is what is needed. I have made a loan to help a small producer. They went on to be a sustainable summer vegetable producer in the area. The loan kept a young family in Grey County. That is a win for us all! If you succeed in producing a commodity the community wants but can't get the processing space or delivery of your product to the market place you are dead in the water. A community kitchen facility would be very helpful since government regulations work so hard to keep small producers from even thinking about baking or making cooked or smoked prepared foods. A community kitchen that could be rented out by the day to individuals so they could produce their products in a Board of Health certified kitchen that small producers cannot presently access or afford to build on their own. If we don't have a strong web presence we will be missing out on the largest market there is. The more urbanized your market goals are the more web connected you must be. I found EatLocalGreyBruce Coop on-line. There is no other way for them to function effectively. This is going to be a larger and larger demand in the very near future. If you don't look after the soil you will not be profitable in the long term. I don't want to see more mono-cropping which destroys animals and insects and will eventually cease to produce any crop and the land will be dead. Grey County should support it's local farmers. They produce quality products. Fresher than imports or produce shipped in from Toronto. What's wrong with picked today and eaten today for vegetables and eggs?	2/17/2017 4:07 PM
30	It is imperative for local development in any part of the world for its respective region to be sustainable. This of course means supporting local farmers market while rewarding their soil stewardship of the fields they maintain. Supporting not only sustainable green techniques but in the reduction of industrialized chemicals in farming applications. I also believe that research and development to identify not only unique areas of the environment that can produce goods characteristic to its region. One initiative i could think of would be expanding wild mushroom knowledge and developing a sustainable practice of harvesting and distributing wild edible mushrooms: wherein mostly cheap and useless trees like Poplar trees which can produce oyster mushrooms can suddenly become very valuable. Initiatives to encourage local spending however would rely more on the communities in questions prosperity in general.	2/16/2017 5:42 PM
31	As a food producer and local consumer, I want to support local food and food events. I also would like support for our own product sales/distribution	2/16/2017 5:20 PM
32	Farmers are growing food close by but we need a way of processing it and getting it to the consumer. Financial support for local growers seems like a good allocation of funds and money well spent to me, anything to get smaller farms happening and supporting more of them. We need more people to farm and in an ecologically responsible way! We need to support farming practices that are sustainable.	2/16/2017 3:38 PM
33	Trying to find support for small sustainable farms.	2/16/2017 3:05 PM
34	It would help strengthen the local food plans already established and encourage the purchase of local food	2/16/2017 10:10 AM
35	Because they are grassroots people focussed	2/16/2017 12:26 AM
36	Supports growth of local farms, food businesses and local businesses more generally.	2/15/2017 6:53 PM
37	I feel that these 5 priorities will assist in getting the message out about local food.	2/15/2017 2:50 PM
38	Objective align with our new priorities as a hospitality and tourism centre, rather than just a processing facility.	2/15/2017 2:50 PM
39	I believe it obvious supporting what is already in place at the farmers' markets is one of the easiest ways to get the bang for you buck. Social Media plays a big part in the young for decisions. Tourism is just extra dollars coming in to the county and we should "tag along" and collect some of those dollars.	2/15/2017 7:35 AM
40	1. Grants offer such a valuable resource to established farmers operating under tight profit margins to expand their capacity 2. Soil is of utmost importance and finding a way to monetize this, to support farmers for their service of sequestering CO2 and preventing water pollution is paramount 3. Local Farmers Markets offer a foundational meeting ground for farmers as well as other vendors to start-up 4. Getting local and sustainable foods into hospitals, schools, old-age homes would add alot of value to these facilities. 5. Recirculating local dollars builds a resilient, cohesive economy that can weather broader economic challenges with greater skill	2/14/2017 8:59 AM

## Local Food Strategic Plan for Grey County

41	Farmers' Markets are growing throughout Grey County and throughout the province and people know and trust farmers' markets as reliable places to get local foods. Farmers' Markets also can promote food entrepreneurship, as they are a very cost-effective way for food businesses just starting to get known in the community. A strong web presence to connect businesses to consumers is important, as more and more people are using the internet to purchase foods. Every community throughout Grey County needs a food hub, or centre for agro-economy, for processing and distribution of foods. The importance of shopping as local as possible gets trumped by cheaper foods imported and we should be shifting towards procuring as local as possible. Micro-grants for new or existing small businesses are scarce and this can help spur on businesses.	2/13/2017 9:41 PM
42	If we obligate and educate people, you are more likely to get the results you want. Research does not lead to innovation right now, I believe you want change NOW.	2/13/2017 4:24 PM
43	They will all encourage the growth and awareness of the importance of the local food market available in Grey County.	2/13/2017 1:42 PM
44	I think that we need to support existing businesses that are already doing this.	2/13/2017 11:21 AM
45	Need a local brand that local food growers, producers, etc. can promote, the County can promote and help educate and create awareness of the local food brand (e.g. Grown in Grey or Made in Grey). A Food hub(s) for processing and distribution would allow producers and processors to distribute their goods in a more efficient and cost effective way - it would also create synergies with other producers/processors, allow local restaurants to have better access to local food, etc. Develop a strong web presence would allow connections with producers/processors to consumers - it would also help promote the local food brand and also help local food businesses to connect with other local businesses.	2/13/2017 11:12 AM
46	Distribution is major issue across the province, one that won't be solved provincially anytime soon. Regional projects will have trickle down effect achieving many of the other priorities on this list. Connecting people is the number way to solve issues and build awareness. It will get people shopping, talking and innovating -- with the county acting as a conduit. Tourism involves just about every business sector -- restaurants, hotels, farmers, processors, public works, etc. When it thrives, everything else thrives.	2/13/2017 9:32 AM
47	The local economy is a pervasive disabler of local food strategy: 1) most Grey County residents feel they are too poor to afford quality food; 2) too much money leaves our community via restaurant and institutional purchasing, e.g. Sysco. I focussed on building local markets for two years and realized they are incapable of sustaining my business; I need those free-flowing big city \$. Another pervasive disabler is the decline of home economics in schools and the growth of processed food: consumers know less and less how to cook from unprocessed ingredients (which forms the vast majority of local food); I also think they don't value the associated improved nutrition or taste or family-building. Farmers markets have entered the mature stage of product life cycle: anyone who cares already knows about them. There is a long list of dead or dying initiatives to connect businesses with consumers: ACA, Foodlink, Chefs Forum. I believe one of the best things government can do to support local food is to buy it: put your money where your mouth is and invest the time and money to use local ingredients. The economics of farming in the last 30 years have squeezed farmers; unfortunately one way to cut costs is to not reinvest in the means of production: the soil. "Support" should be reward for results, not incentives to take actions.	2/13/2017 7:28 AM
48	1. Supports all local business. Local business spend at other local businesses. 2. No excuse for grey county facilities not to be sourcing when possible from grey county. 3. Doing the right thing shouldn't cost more for the land owner. 4. will ensure success of food sector as designation 5. allowing micro business to follow guidelines and laws	2/13/2017 6:40 AM
49	local food business need money to grow, agri-tourism just makes sense in our area, soil is what we all depend on, a grey brand could be helpful for local marketing and sales to the gta	2/12/2017 8:34 PM
50	I feel it is important to support the creating and sustainment of local businesses in order to create a brand/reputation for Grey County as an incubator for great artisanal local food.	2/12/2017 11:33 AM
51	I prefer to focus on things we can do locally - support local businesses and keep/create jobs here.	2/11/2017 1:17 PM

## Local Food Strategic Plan for Grey County

52	<p>1) Many of the existing federal and provincial grants, including environmental programs, are focused on large projects which are often undesirable or unrealistic/unattainable for small producers. Grey county previously had grants to promote small sustainable producers, but cancelled them to focus on tourism development... 2) When need to encourage people to spend their money on local products and at local stores to help grow the local economy and orient food production towards markets. There is too much emphasis, especially at the federal level, to grow the export economy, something that is environmentally unsustainable and creates a dependence on foreign markets. This is a problem for food security and transparency in food production. 3) Farm gate, farmer's markets and CSAs are all great production models. Food hubs could help attract more people to local food and make it easier for producers to focus on production instead of a lot of time spent on marketing, processing, etc. People are used to one stop shopping and food hubs and local processing could make this possible while still supporting local producers. 4) As more and more of Grey County moves towards annual cash cropping and large monocrop operations of commodity crops, more and more soil is being depleted and treated poorly. We need to promote soil stewardship practices so farmers don't deplete soil, our most important resource for food production. 5) Government institutions, including schools and hospitals, are large buyers of food and can help to shift the market with their buying power and the example they set of non government institutions. This is why all government institutions, not just county ones, should switch to buying as much local food as possible. Schools and hospitals traditionally have abysmally low quality of food and yet are providing for the parts of our demographic in the greatest need of healthy local food, kids and the sick.</p>	2/11/2017 10:40 AM
53	<p>The local food system is broken - fragmented, only remnants of a food chain. We need strategic re-building of a food system: Identify missing links and strategically invest in these, even if they are not the most profitable elements of the chain.</p>	2/11/2017 8:45 AM
54	<p>We need to find ways for local growers to be able to make a living growing food.</p>	2/11/2017 6:32 AM
55	<p>I think soil is the top priority for growing healthy food and feel if grey county focused on healthy soil as a standard it would be a great branding to set us apart from other areas. We have a lot of land that can grow a lot of healthy food if we can be educated on how to sustain our land for future generations.</p>	2/10/2017 8:54 PM
56	<p>Eat local grey bruce is a great organization. However probably more than 90% of the food is sold in big chain stores. We have to find a way to get local food into these stores.</p>	2/10/2017 7:44 PM
57	<p>Brand our products and promote them</p>	2/10/2017 7:19 PM
58	<p>Like to see a web presence, brand, micro grants and tourism. Not much interest in the others.</p>	2/10/2017 6:09 PM
59	<p>Make it as easy as possible for food to get from a farm to a table. (1-3). Make sure mass-farming doesn't ruin our fertile soil (4). Make it easy to identify what is grown in our back yard (5).</p>	2/10/2017 6:07 PM
60	<p>If Grey County itself started sourcing most of its produce from local producers, that would inject hundreds of thousands of dollars into county products, without even having to give out loans/grants, etc. This is existing spending that must occur that could be redirected to benefit the county.</p>	2/10/2017 5:46 PM
61	<p>Food tourism is on the rise, as is seeking experience, soil health addresses almost every big issue</p>	2/10/2017 5:36 PM

## Q9 Do you have any additional ideas to fill the gaps within the Grey County local food value chain?

Answered: 40 Skipped: 71

#	Responses	Date
1	I'm willing to think on it..to be part of its future.	3/3/2017 3:46 PM
2	we are not farmers so do not know all the issues that you have to deal with, we do have an idea because we have a garden but of course farmers have so many more issues	3/2/2017 8:53 PM
3	REAL education for the younger generation about true food value, and sustainable, organic food production and consumption, NOT dependent upon Canada's food guide, which is one sided.	2/28/2017 10:55 AM
4	none	2/27/2017 7:30 PM
5	For procurement - does not just relate to County Procurement. Events and festivals should also have a minimum local food component, or opportunity for local food businesses to advertise and sell product.	2/27/2017 5:47 PM
6	Help producers price there goods. Most Farmers Markets are over priced and therefore treated as a "special"outing rather than a general part of a persons shopping routine	2/27/2017 5:31 PM
7	Perhaps pressure on the grocery stores? Or would this take away from existing distribution?	2/27/2017 5:04 PM
8	what gaps	2/27/2017 3:32 PM
9	Minimum wage for farmers, subsidized to encourage employment in the area of farming and agriculture	2/27/2017 3:29 PM
10	Education of youth as to viability of small scale farming, young people see desk jobs as job One, getting their hands dirty, is often not top of the list. but then again is it viable for them to try, where are the examples.	2/27/2017 3:25 PM
11	Inspected community kitchens in village settings to support local initiatives.	2/27/2017 2:37 PM
12	Just link them all	2/27/2017 2:10 PM
13	ensure that all grey county depts. support local food usage	2/27/2017 2:06 PM
14	More info for sourcing- central registry / web info	2/25/2017 8:51 PM
15	A one-stop directory of community kitchen spaces in the county that are available to rent, with contact info and fees. Mentorship opportunities for new food entrepreneurs. More workshops and education series (maybe several small ones throughout Grey and Bruce) with practical focuses. Eg. Understanding labelling rules. Purchase nutritional labelling software (eg. Genesis) with some kind of communal access to make it more affordable. Have online access at libraries throughout the county perhaps?	2/25/2017 8:11 PM
16	Need of Abattoirs that perform ethnic slaughtering and butchering (kosher, halal meat). Consumer education on how food is grown and processed in the area.	2/25/2017 12:53 PM
17	Dont delay	2/23/2017 7:26 PM
18	none but I like the focus on this issue.	2/23/2017 4:17 PM
19	Narrow the gap in the huge discrepancy between cost of local food and that sourced elsewhere. Why should a locally grown tomato purchased at a farmer's market cost more than the same tomato grown 300 km south of here in Niagara (assuming all other variables are the same). Most consumers WILL accept a cost differential if product is substantially different, or superior.	2/23/2017 10:23 AM
20	Hubs or central drop off spots would be great. Some way to make ordering easier for restaurants/retail would help to increase availability of products.	2/23/2017 8:53 AM
21	Why is there no list of local farms or orchards on the County web site that produce vegetables, organic or pasture raise meats where a person could connect and make purchases?	2/17/2017 4:07 PM
22	Wild mushrooms could end up being key. There are many untapped possibilities with wild mushrooms mostly because people are afraid of them. For good reason they are, however there is mush to gain. I would strongly advise research and development in wild mushrooms.	2/16/2017 5:42 PM
23	I liked the idea of the food festival that was brought up at the Owen Sound meeting.	2/16/2017 5:20 PM

## Local Food Strategic Plan for Grey County

24	Distribution of local food for a fair price	2/16/2017 10:10 AM
25	Promoting networking and training for farmers and rural entrepreneurs. Look to promote OFFMA within Grey.	2/15/2017 6:53 PM
26	More local foods being offered in schools.	2/13/2017 9:41 PM
27	I plan to attend the trade show in Thornbury in March which I think is a great networking method between producers, processors, retail, distribution, etc.	2/13/2017 1:42 PM
28	To continue from response to #8 - we need policies to support the creation of ag-tourism and look for more opportunities to connect local food with tourism (e.g. apple pie trail, saints and sinners, etc.). Also need to create an environment (incubator/accelerator) to connect local food business with other businesses to learn from one another, to partner on business adventures, to support best practices, to strengthen the local brand, etc.	2/13/2017 11:12 AM
29	A targeted focus on attracting boutique accommodation attraction. Limited options mean limited visitors. More trucks on the road to facilitate distribution (100KM Foods, Wendy's Mobile Market, etc) Facilitate local distribution to avoid products heading to Toronto (and back up upon sale).	2/13/2017 9:32 AM
30	Grey county should ensure that municipalities are allowing food businesses to prosper without undue regulation or hoops to jump through to get started.	2/13/2017 6:40 AM
31	entice more and skilled butchers to the area -- its not just about cutting and wrapping but adding more value (good sausages, cured/dried meats, etc).	2/12/2017 8:34 PM
32	Grey County as a distributor for its local food producers	2/12/2017 11:33 AM
33	The county should be educating of the unsustainability, socially, economically and environmentally of imported food produced by industrial agriculture, not just promoting sustainable local food production.	2/11/2017 10:40 AM
34	More help is needed to encourage and help families and individuals find the value in cooking.	2/11/2017 6:32 AM
35	Getting useful education available for leaders in local food coops for example Food Hub programs through the university of Vermont	2/10/2017 8:54 PM
36	I think a distributor is needed to connect Grey County food producers and processors with local grocery chain stores. Most of the food is sold there. This would be most effective.	2/10/2017 7:44 PM
37	Like to define "local", I would define what you are doing is "County" not local. Ontario government seems to consider anything in Ontario as local food. I found say local is by community or township.	2/10/2017 6:09 PM
38	no	2/10/2017 6:00 PM
39	Support grassroots developments such as Eat Local Grey Bruce.	2/10/2017 5:46 PM
40	Activities that connect people to the land, especially that which Grey has to offer	2/10/2017 5:36 PM

**Q10 Is there any initiative you have seen succeed in another area that you think has potential to create opportunity for local food in Grey? What and where is it?**

Answered: 36 Skipped: 75

#	Responses	Date
1	community gardens in muskoka region	3/3/2017 3:46 PM
2	this is a first for us , so no we do not have any suggestions	3/2/2017 8:53 PM
3	Cluster promotion ie. Wineries	3/2/2017 1:14 PM
4	none	2/27/2017 7:30 PM
5	Yes - on Farm events such as the ones held at the New Farm. These are fantastic. The Taste of the Town in Collingwood is also another good example of showcasing local food and wine.	2/27/2017 5:47 PM
6	Develop a local educational component to encourage the local youth to think of local food as part of their future. (Growing, processing, culinary arts, hospitality, etc)	2/27/2017 3:59 PM
7	no	2/27/2017 3:32 PM
8	connecting schools through farm to table activities from the classroom to the farm, partners in growing and harvesting to selling and consuming.	2/27/2017 3:29 PM
9	Feast of the Fields, years ago.	2/27/2017 3:25 PM
10	Great Britain's well-managed trail system, in which farms and cottages along the paths put out a sign and a bell; walkers can ring a bell, settle into a chair outdoors, and be served refreshments. We did this in Cornwall, but it is widespread. "Rambling" worked well with local food initiative: a network of informal micro cafes. (No table, no bell? No scones today)	2/27/2017 2:37 PM
11	Prince Edward County	2/27/2017 2:10 PM
12	Orillia- food towers	2/25/2017 8:51 PM
13	Still lots of potential for Eat Local Grey Bruce. I think it is really valuable to have a distribution and communication system that connects eaters and farmers across Grey and Bruce.	2/25/2017 8:11 PM
14	Farm tours, holidays on the farm. People see and learn where there food comes from and how it is grown. Building of consumer-producer relationships and avoiding a lot of misconceptions.	2/25/2017 12:53 PM
15	Niagara vinters	2/23/2017 7:26 PM
16	n/a	2/23/2017 4:17 PM
17	I like the GB co-op's local recipe contest, using in-season ingredients. More things like that would be good. How about restaurants competing for best dish (chili, soup, etc) using local, in season ingredients?	2/23/2017 10:23 AM
18	Localline.ca is trying to make procurement of local foods much easier for businesses.	2/23/2017 8:53 AM
19	On a larger scale, New York State created a tax incentive for brewers to purchase local ingredients. This incentive has increased the number of breweries and ingredient producers creating a strong close cycle of production.	2/23/2017 7:36 AM
20	I believe there is a Community Kitchen in the Kingston area that opened recently to rave reviews. There were to be cooking classes for people on budgets, different ethnic groups and help for people with special cooking needs. Then it was rented to small start-ups to make cakes, breads, jams and meat pies in quantity. New caterers with plenty of ambition and less money trying to get a foot in the door.	2/17/2017 4:07 PM
21	With Global Warming making areas warmer, more exotic species may be able to adapt. One such species may be Chicago Hardy Fig Tree which is well known to be able to grow well in Ontario.	2/16/2017 5:42 PM
22	The Foodie Mentor Mash in Barrie Food Starter in Toronto And it would be nice if there were Henry Bernick Entrepreneur classes run through either the Owen Sound or Collingwood Georgian College instead of having to travel to Barrie.	2/16/2017 5:20 PM

## Local Food Strategic Plan for Grey County

23	Niagara Presents Community commercial kitchens OFFMA	2/15/2017 6:53 PM
24	Prince Edward County has a great model...maybe there's something we can learn from that.	2/15/2017 2:50 PM
25	Michigan State has a great initiative - Hoop Houses for Health, by which farmers with a good plan can apply for a loan to put up hoophouses. These are then repayed in kind, as the farmer "sells" or donates produce to an initiative making organic food more accessible to low-income households. It essentially recycles loan dollars twice!	2/14/2017 8:59 AM
26	Some weblinks- <a href="http://www.revelstokelocalfood.com/">http://www.revelstokelocalfood.com/</a> <a href="http://rainalgoma.ca/">http://rainalgoma.ca/</a> <a href="http://buyalgoma.ca/">http://buyalgoma.ca/</a>	2/13/2017 11:12 AM
27	Food hubs catering to foodservice -- but I think you already did this. Maybe it just wasn't the right time then.	2/13/2017 9:32 AM
28	incubator kitchen for small business, eastern ontario	2/12/2017 8:34 PM
29	Co-operatives that support local food distribution to larger suppliers.	2/12/2017 11:33 AM
30	no	2/12/2017 8:38 AM
31	The Northumberland county processing plant	2/10/2017 8:54 PM
32	We sell grey county food all over canada, however because of a lack of distribution we sell very little locally.	2/10/2017 7:44 PM
33	Some people want more than just buying the product. It could simply be social interaction, pick your own, quality, provide knowledge either verbally or with literature.	2/10/2017 7:19 PM
34	Butter Tarts & Buggies has more local Grey County establishments than Saints and Sinners yet S&S is strongly supported by Grey. BT&B has no support from Grey County. Like to see initiatives that support all of Grey and not just Northern Grey/Georgian Bay.	2/10/2017 6:09 PM
35	none	2/10/2017 6:00 PM
36	Prince Edward county food tourism. Local food as a movement is not viable.	2/10/2017 5:36 PM



## Local Food Strategic Plan for Grey County

**Q11 Is there anything else you'd like to add? Please share any thoughts that have not been captured in the questions above. This is your chance to think outside the box... (but write it in the box).**

Answered: 41 Skipped: 70

#	Responses	Date
1	we think what you are doing is great , we like that you are adding more product.	3/2/2017 8:55 PM
2	More gardens and food growing training in our education systems.	2/28/2017 10:56 AM
3	We need to support farmers financially that are building carbon in our soil. This should be tested, and this is done by rotation of animals and crops over land in a environmentally conscious manner. These practices require quality over quantity as the main objective.	2/27/2017 7:34 PM
4	Great initiative!	2/27/2017 6:04 PM
5	The county needs to rethink its Local Food Program.It currently appears to favour a select few businesses. In my opinion, the county (or any Government entity) should be promoting the concept while educating individual businesses on promotion and marketing, not promoting and marketing specific businesses.	2/27/2017 5:34 PM
6	Continue to promote tourism to our area for local food and produce, help advertise restaurants that use local produce.	2/27/2017 5:05 PM
7	this survey was too difficult to understand	2/27/2017 3:32 PM
8	I just hope that this generates some form of local education as to the value of local farm and food production in the Grey Bruce area.	2/27/2017 3:28 PM
9	Your #6 question is improperly designed. It accommodates only priority ranking. Mid-size farming and local food processing will require a radical re-think of the current federal and provincial legislative frameworks. But in the meantime, we can try to model solutions in Grey.	2/27/2017 2:40 PM
10	Continue to investigate ways to support the local agri-food sector and wherever possible increased the supports needed to ensure small businesses are provided with long term support in order to ensure the long term health of the sectors	2/27/2017 2:10 PM
11	Support CSAs and help make the concept more accessible for people. Help is needed for local sheep farmers who struggle with a lack of a local abattoir.	2/25/2017 11:21 PM
12	I am really excited about the potential for celebrating, supporting and fostering local food in Grey County. Especially excited to see support for and framework development around new small businesses that use raw products from local farms and growers. I see the value in partnering with surrounding counties as well. Would value having a web resource for food entrepreneurs in Grey County with links to educational resources, market contacts, omafra documents, relevant federal legislation, municipal regulations, funding opportunities, roster of community kitchens Create a way for producers and processors to work together / talk about (not only) the ingredients that are available locally, but what processors could use if it were locally grown, even in small quantities. Maybe some farms are willing to custom-grow in small to medium size quantities for processors? (for example, local sunflower seeds)	2/25/2017 8:36 PM
13	Consumer education is very important. There are a lot of misconceptions about farming, the environment and the economic side of the game. We all want to be animal friendly, environmentally friendly and eat healthy local food but nobody wants to pay for it nor has an idea of what the cost of things are and the labour involved. E.g. Everybody is complaining about supply management and the rich dairy farmers but hardly anybody has an idea what it cost to start and run a dairy nor how much work it takes.	2/25/2017 1:01 PM
14	Glad to see the county start this initiative	2/23/2017 7:31 PM
15	There are great things happening and alignments are occurring. Keep going!	2/23/2017 4:18 PM
16	People DO want to eat locally, but they need the opportunity to taste the difference, or know the difference it's making to our community and lives of producers/farmers. Keep in mind average income levels in Grey County cannot support some of the prices that are often charged for "specialty" local food. What can we do about this, to make local food more affordable while compensating our growers and producers fairly and acknowledging their costs are often higher than large-scale producers? Should have written in previous box, but let's revive the idea of the long table event!	2/23/2017 10:30 AM

## Local Food Strategic Plan for Grey County

17	Giving people more access to local foods to share our "taste of Place" is a HUGE asset for tourism operators, local farmers, restaurants and local food retailers.	2/23/2017 8:54 AM
18	I would reiterate question 10.	2/23/2017 7:39 AM
19	As a not-for-profit with limited budget and resources, it is often difficult for us to buy locally in a convenient and cost-effective way. Although we do have a partnership with a local CSA where we host their "pick-up location" here at our centre and the farm provides the kitchen with vegetable donations, we often need other produce to run our culinary skills program. On another note, just filling out this survey and specifically #5 has helped with knowing more about local food initiatives and thinking about different avenues in which we could source local food.	2/21/2017 4:15 PM
20	Your question to arrange the eleven items in priority was very difficult. Each item has its own merits. Because I chose the 5 items I did, doesn't mean the others aren't important to me. I think the Farm Federations and unions and Ag.s are absolutely vital to progress of local food priorities and they look after themselves. I haven't noticed that they particularly care about the young people trying to improve the quality of food and life in the Grey Bruce.	2/17/2017 4:15 PM
21	There is still many resources in our environment yet to be understood and much ingenuity yet unleashed. We need to keep not only our forests in tact but to grow them outwards to combat desertification. Desertification is a real threat to the world and must be addressed. There is no safer storage of value than an environment thats clean, robust and able to produce.	2/16/2017 5:44 PM
22	The Food Entrepreneur Workshops are a great way for start up foodies to talk to each other. I think having some events like a farmers market but with more of a festival atmosphere would be a great way to introduce the fantastic products being produced here to the general public/foodies in the area....and would start to brand Grey County as a destination place-like Niagara or Prince Edward County	2/16/2017 5:27 PM
23	Question 6...the survey would not let me rank each statement individually and it made sense to me that I should be able to....so I left it blank...sorry	2/16/2017 3:42 PM
24	Looking to educate locals on where or how they can access the small farm offerings.	2/16/2017 3:09 PM
25	Ranking 11 items questions very confusing. Not clear who would lead or take on any or most of these priorities, or how. Nice to think pie in the sky but not seeing the applied and practical in the line of questions asked. Local food is a self-sufficiency issue for communities - nice to have for tourism,maybe, but at the end of the day what is unique food wise in Grey that isn't available elsewhere?	2/15/2017 6:57 PM
26	Thank-you for doing this survey.	2/13/2017 1:43 PM
27	Producers need to support resellers, just as resellers need to support producers.	2/13/2017 11:22 AM
28	Over all, Grey County is leading the pack in terms of innovative initiatives for it's food producers. If there is any issue, it's that there are too many varied projects/opportunities creating noise in the region. Stream lining efforts would create a clear brand/identity and prevent decision fatigue for industry.	2/13/2017 9:37 AM
29	I believe that local food is only beneficial if we( farmers) are building the soil. Soil building is long-term, whereas we can break down the soil quickly. I used to consider myself a grass farmer, but now I consider myself a microbe farmer. It's the microbiology in the soil that matters. Also we need more local custom abattoirs closer to Owen Sound, particularly for poultry and pork, but also for beef and lamb.	2/13/2017 9:15 AM
30	1) You should conduct stakeholder meetings on the demand side too: what would it take for local institutions, restaurants and stores to substantially increase their purchases of local food? For consumers, local transition town groups or foodies might be good sources of focussed input, but even municipal employees could be a reasonable proxy for the general population. 2) The regulatory burden disadvantages local food. All these different government bodies each with their own (sometimes overlapping) regulations who don't know what each other are doing put all the onus on producers to untangle the plate of spaghetti that is the current state of food regulations (in our spare time, of course because half our time is spent producing food and half marketing and distributing). Maybe government could facilitate navigating regulations by having someone stay on top of regulations, disseminate overviews by product on a County website, consult with producers at subsidized rates, and maybe even liase with regulators. 3) One-size-fits-all regulation has effectively given competitive advantage to large agricultural corporations over small producers and processors: look at how the distribution of the number and size of meat processors has shifted over the last 20 years. This is because corporations' economies of scale mean each regulation impacts their profitability less than it does for smaller entities. The overall result is that the regulatory framework has given competitive advantage to the entities that pose the biggest food safety risks; I.e. exactly the opposite of promoting or securing the public good. 4) There are a lot of local food initiatives which have delivered mediocre results. Has anyone analyzed why they underperform?	2/13/2017 7:48 AM
31	The expansion of natural gas infrastructure, and high speed internet will further spur the development of both agri-food and non-agri-food businesses.	2/13/2017 6:50 AM
32	stop spending money on studying the challenges by hiring urban consultants and actually start doing something	2/12/2017 8:35 PM

## Local Food Strategic Plan for Grey County

33	A conference/think-tank day facilitated once a year by Grey County, specifically designed to bring together local food businesses to strategize effective ways to coordinate marketing and distribution of local brands to more southern consumers such as Toronto, hamilton, Guelph, London etc.	2/12/2017 11:34 AM
34	My thought is - Is there some product that we can become famous for - better than everyone else - then branch out from there?	2/11/2017 1:22 PM
35	Thank you for doing this survey and for taking local food planning seriously. I take this as a very positive sign of an acknowledgement of the need for greater support for local food in our economy and for the environmental and human health benefits it can bring.	2/11/2017 10:43 AM
36	The culture of making food from scratch at home or within a community setting needs help. If schools were involved in farm to table type programs that would spread local food ideas to the broadest population.	2/11/2017 6:38 AM
37	Free education for farmers in marketing, business and technology to get them trained for a growing market	2/10/2017 8:56 PM
38	Thanks for working on this issue. Unfortunately operating a business leaves very little time to engage, I certainly plan on attending the meeting that connects food producers with buyers.. keep up the good work!!	2/10/2017 7:47 PM
39	Our economy in Southern Grey is all about agriculture. Would not like to see initiatives that primary benefit the Georgian Bay area and leave out Southern Grey.	2/10/2017 6:12 PM
40	no	2/10/2017 6:00 PM
41	Question #6 is incorrectly set up. I choose '1' for all of them.	2/10/2017 5:48 PM

**Q12 Please include your contact information if you would like a response about anything in particular (see below). Your information will not be shared with anyone outside the project team (Planscape and Grey County Economic Development).**

Answered: 43 Skipped: 68

Answer Choices	Responses
Name	95.35% 41
Business / Organization	88.37% 38
Email	100.00% 43
Phone	76.74% 33
Contact me about:	32.56% 14

#	Name	Date
1	David Walton	3/3/2017 3:47 PM
2	Susan Winslow	3/2/2017 8:55 PM
3	Curtis Schmalz	2/27/2017 8:38 PM
4	Mitchell Good	2/27/2017 7:34 PM
5	Rosemary Crick	2/27/2017 4:03 PM
6	Jim Halliday	2/27/2017 4:02 PM
7	Birgit Wright	2/27/2017 3:28 PM
8	Richard Broadwith	2/27/2017 2:11 PM
9	Lynn Hynd	2/27/2017 2:10 PM
10	Allison Brown	2/25/2017 8:36 PM
11	Lena Kleist	2/25/2017 1:01 PM
12	Stewart Halliday	2/23/2017 7:31 PM
13	Barbara Fedy	2/23/2017 4:18 PM
14	Kim Clarke	2/23/2017 8:54 AM
15	Nicholas Schaut	2/23/2017 7:39 AM
16	Jacinda	2/21/2017 4:15 PM
17	Jarrit Sachan	2/16/2017 5:44 PM
18	Jennifer Potter	2/16/2017 5:27 PM
19	Lisa Squire	2/15/2017 4:46 PM
20	Alyson Douglas	2/15/2017 2:50 PM
21	Abby Miners	2/15/2017 7:35 AM
22	Mike Reid	2/14/2017 8:59 AM
23	Jaden Calvert	2/13/2017 9:42 PM
24	Arlen Taylor	2/13/2017 4:25 PM

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25	Trina Render	2/13/2017 1:43 PM
26	Paul MacDonald	2/13/2017 11:22 AM
27	Randy Scherzer	2/13/2017 11:12 AM
28	Agatha Podgorski	2/13/2017 9:37 AM
29	Gerald te Velde	2/13/2017 9:15 AM
30	Kyle Oakley	2/13/2017 6:50 AM
31	kristine hammel	2/12/2017 8:35 PM
32	Candice Newmaster	2/12/2017 11:34 AM
33	roy love	2/12/2017 8:39 AM
34	Devan Penney	2/11/2017 10:43 AM
35	Jeff Koehler	2/11/2017 9:57 AM
36	Cory Eichman	2/11/2017 6:38 AM
37	Cindy Phillips	2/10/2017 8:56 PM
38	Johannes Schneider	2/10/2017 7:47 PM
39	Glenn Walker	2/10/2017 6:12 PM
40	Greg Galoska	2/10/2017 6:08 PM
41	Brenda Hsueh	2/10/2017 5:48 PM
#	Business / Organization	Date
1	MacLean's Ales Inc.	2/27/2017 8:38 PM
2	Good Family Farms	2/27/2017 7:34 PM
3	Crickhollow	2/27/2017 4:03 PM
4	The Pickle Guy, Grey Highlands Chamber of Commerce	2/27/2017 4:02 PM
5	Birgit's Pastry Cafe	2/27/2017 3:28 PM
6	BCI Marketing Partners Inc	2/27/2017 2:11 PM
7	Georgian College	2/27/2017 2:10 PM
8	Lena Landei Country Culture	2/25/2017 1:01 PM
9	The Pickle Guy Company -Grey Highlands Deputy Mayor	2/23/2017 7:31 PM
10	Grey County Social Services	2/23/2017 4:18 PM
11	RTO7	2/23/2017 8:54 AM
12	Bighead Hops	2/23/2017 7:39 AM
13	Launch Pad	2/21/2017 4:15 PM
14	N/A	2/16/2017 5:44 PM
15	Quiet Valley Sauce and Vine	2/16/2017 5:27 PM
16	WestWind Farms	2/16/2017 3:09 PM
17	Thornbury Cidery	2/15/2017 4:46 PM
18	Thornbury Village Cider and Brew House	2/15/2017 2:50 PM
19	Miners' Maple Product	2/15/2017 7:35 AM
20	Kolapore Gardens	2/14/2017 8:59 AM
21	Meaford Farmers' Market	2/13/2017 9:42 PM
22	Cedar Crest Trout Farms	2/13/2017 4:25 PM
23	Your Natural Choice	2/13/2017 1:43 PM

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24	Lawson's	2/13/2017 11:22 AM
25	County of Grey	2/13/2017 11:12 AM
26	Culinary Tourism Alliance	2/13/2017 9:37 AM
27	Twin Creeks Farm	2/13/2017 9:15 AM
28	Goldsmith's Orchard Market	2/13/2017 6:50 AM
29	Ironwood Coffee Company	2/12/2017 11:34 AM
30	royl acres farm	2/12/2017 8:39 AM
31	Fair Fields	2/11/2017 10:43 AM
32	Saugeen River CSA	2/11/2017 6:38 AM
33	Rob Roy Market Garden	2/10/2017 8:56 PM
34	Saugeen Country Dairy	2/10/2017 7:47 PM
35	Oaklane Orchards	2/10/2017 7:20 PM
36	Township of Southgate Economic Development	2/10/2017 6:12 PM
37	The Flying Spatula Diner	2/10/2017 6:08 PM
38	Black Sheep Farm	2/10/2017 5:48 PM
#	Email	Date
1	walton.david28@gmail.com	3/3/2017 3:47 PM
2	susanwinslow53@gmail.com	3/2/2017 8:55 PM
3	curtis@macleansales.ca	2/27/2017 8:38 PM
4	goodfamilyfarms@gmail.com	2/27/2017 7:34 PM
5	rosemary@crickhollow.ca	2/27/2017 4:03 PM
6	43halliday@gmail.com	2/27/2017 4:02 PM
7	awlwright50@hotmail.com	2/27/2017 3:28 PM
8	richard@bcimarketing.ca	2/27/2017 2:11 PM
9	lynn.hynd@georgiancollege.ca	2/27/2017 2:10 PM
10	allison.of.brown@gmail.com	2/25/2017 8:36 PM
11	Lena.landei.cc@gmail.com	2/25/2017 1:01 PM
12	hallidays@greyhighlands.ca	2/23/2017 7:31 PM
13	barb.fedy@grey.ca	2/23/2017 4:18 PM
14	kclarke@rto7.ca	2/23/2017 8:54 AM
15	nicholas@bigheadhops.com	2/23/2017 7:39 AM
16	jacinda@yatc.ca	2/21/2017 4:15 PM
17	jamesjarritson@hotmail.com	2/16/2017 5:44 PM
18	sizzle@quietvalley.ca	2/16/2017 5:27 PM
19	westwindfarms@xplornet.ca	2/16/2017 3:09 PM
20	lisa@coliowinery.com	2/15/2017 4:46 PM
21	alysond@coliowinery.com	2/15/2017 2:50 PM
22	abbymaple@hotmail.ca	2/15/2017 7:35 AM
23	Mreid5363@gmail.com	2/14/2017 8:59 AM
24	jaden.calvert@gmail.com	2/13/2017 9:42 PM
25	l.arentaylor@gmail.com	2/13/2017 4:25 PM

## Local Food Strategic Plan for Grey County

26	trinarender@gmail.com	2/13/2017 1:43 PM
27	paul@lawsons.ca	2/13/2017 11:22 AM
28	randy.scherzer@grey.ca	2/13/2017 11:12 AM
29	agatha@ontarioculinary.com	2/13/2017 9:37 AM
30	twcr1973@gmail.com	2/13/2017 9:15 AM
31	kyle@goldsmithsmarket.com	2/13/2017 6:50 AM
32	kristine.hammel@gmail.com	2/12/2017 8:35 PM
33	ironwoodcoffee@gmail.com	2/12/2017 11:34 AM
34	roylove@sympatico.ca	2/12/2017 8:39 AM
35	devanpenney@gmail.com	2/11/2017 10:43 AM
36	jjk@pensbyjeff.ca	2/11/2017 9:57 AM
37	saugeenrivercsa@gmail.com	2/11/2017 6:38 AM
38	cindyrrmg@gmail.com	2/10/2017 8:56 PM
39	johannes@saugeencountrydairy.com	2/10/2017 7:47 PM
40	oaklane@bell.net	2/10/2017 7:20 PM
41	gwalker@southgate.ca	2/10/2017 6:12 PM
42	g.galoska@gmail.com	2/10/2017 6:08 PM
43	info@justblacksheep.com	2/10/2017 5:48 PM
#	Phone	Date
1	519-396-3886	3/2/2017 8:55 PM
2	5193789044	2/27/2017 8:38 PM
3	519-616-1090	2/27/2017 7:34 PM
4	5196657555	2/27/2017 4:03 PM
5	416 520 0182	2/27/2017 4:02 PM
6	519-986-2918	2/27/2017 3:28 PM
7	5198233846	2/27/2017 2:11 PM
8	705-444-9950 x 2910	2/27/2017 2:10 PM
9	519 375 1433	2/23/2017 7:31 PM
10	519-376-9293 ext 1389	2/23/2017 4:18 PM
11	519 506-6300	2/21/2017 4:15 PM
12	N/A	2/16/2017 5:44 PM
13	519-599-7976	2/16/2017 5:27 PM
14	519-986-1689	2/16/2017 3:09 PM
15	6472906728	2/15/2017 2:50 PM
16	5193767907	2/15/2017 7:35 AM
17	519-599-5363	2/14/2017 8:59 AM
18	519-378-5435	2/13/2017 9:42 PM
19	15194938008	2/13/2017 4:25 PM
20	519 416 6600	2/13/2017 1:43 PM
21	519-376-7628	2/13/2017 11:22 AM
22	519-372-0219 x1237	2/13/2017 11:12 AM

## Local Food Strategic Plan for Grey County

23	647-866-7386	2/13/2017 9:37 AM
24	705-444-9060	2/13/2017 6:50 AM
25	5198290228	2/12/2017 11:34 AM
26	5193538895	2/12/2017 8:39 AM
27	(519) 665-7982	2/11/2017 10:43 AM
28	5193693567	2/11/2017 6:38 AM
29	519-377-1578	2/10/2017 8:56 PM
30	519 369 5836	2/10/2017 7:47 PM
31	519-377-5057	2/10/2017 6:12 PM
32	5199242424	2/10/2017 6:08 PM
33	519-363-2199	2/10/2017 5:48 PM
#	Contact me about:	Date
1	putting together videos informing the general public and farmers on sustainable farming practices.	2/27/2017 7:34 PM
2	Organic baking specifics and differences	2/27/2017 3:28 PM
3	updates on events and supports for the sector	2/27/2017 2:10 PM
4	Any of the above, especially regarding education, marketing or funding opportunities for new local food entrepreneurs	2/25/2017 8:36 PM
5	Moving to the next stage	2/23/2017 7:31 PM
6	ANYTHING that benefits our centre and kitchen!	2/21/2017 4:15 PM
7	Anything	2/16/2017 5:44 PM
8	food festivals/marketplace events-I would love to be part of hooking up producers and foodies in the area through local events	2/16/2017 5:27 PM
9	future local food strategic planning	2/13/2017 9:42 PM
10	Anything! Happy to help.	2/13/2017 9:37 AM
11	new or proposed abbatoirs	2/13/2017 9:15 AM
12	my answers or other economic development questions	2/13/2017 6:50 AM
13	The results of this survey and your incorporation of the results into the strategic plan. Also any micro financing, marketing or other initiatives that result from the process.	2/11/2017 10:43 AM
14	Butter Tarts & Buggies and Township of Southgate	2/10/2017 6:12 PM



## APPENDIX 5

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### Interview Summaries



**Helma Geerts** – March 3

Asset Mapping has been completed. Lessons learned – Data maintenance – Municipality use and updates are necessary.

Contact Barb Smith (519) 826-3946

Jeff O'Donnell (No contact. Returning March 21) – Local Food Policy

**Bryan Plumstead** - March 7, 2017

Look and clarify Roles & Responsibilities. Clarify where County should either lead, assist or get-out-of-way.

GB Foodlink – look at Grey only model.

What works well are the face-to face meetings with speakers, etc. Great reviews and turnouts.

Looking to fine evidence based statistics to support initiatives and focus direction is tough.

Contact Gary Gingras – Former Chair of ED Committee – Chef's Forum – Failed. Why? Lessons learned? – Great perspective from Tourism/culinary side.

**Cheryl Brine** – Look at Local Food Act!!! Funding? Election? May re-direct progress at the Province.

Difficult to sell the “local food” and “local support” into restaurants and businesses. REQUIRED! Must focus more attention to this aspect.

Need communication piece – Local is great.

GB Ag. Culinary Association has completed a map. Look at taking it to next level. Use GGHFAFA as a model.

Chef's Forum was great getting local food to Toronto. Fell apart. Food Hub and Distribution is very difficult and expensive due to distance.

KEEP IT SIMPLE. BUILD UPON SUCCESSFUL PROGRAMS AND INITIATIVES. GET RESTAURANTS AND LOCAL BUSINESSES ON BOARD. SUPPORT LOCAL BUSINESSES.

Food Charter is done. Mention that it has been endorsed.

Contact Jenny Amy – Past Chair at GB Ag & Culinary Ass'n. 519-797-1818

**Barb Smith** – Foodland Ontario Taking over for Jeff O'Donnell. Mainly policy end. Look at Local Food Act and Local Food Report (15-16). Sent e-mail wait to hear back.

**Thorston Arnold** – Missing link is distribution. Possible solution is to create an online local market.

Share ideas and experiences. Leads to building trust. Need strategy to align organizations. Need to implement...“rubber hitting the road”.

SEE POSITION PAPER:

Barriers – Distribution of food; space for incubation, opportunities to share and learn from experiences; joint marketing and branding; basic processing infrastructure, R&D; targets unique location.

Need collaborative networks, learning opportunities, trust building.

**Cindy Wilhelm** – Local Marketing – 50 Tastes of Grey – Food is Love – Marketing to challenge local restaurants. Need more local food stores, and Commercial kitchens.

Issues with cutting meat – quotas, regulations and inspections. Fair wages for farm help. Regs at Municipality or County.

County owned Incubator run farm program – 5 acres to grow...and in return, time!

Hydro costs are high. Delivery charges.

Promote organic material to go back into soils – it works!

Grey needs a specific percent to be local products at farmers markets and through procurement.

Partner farm agreements.

**Randy Scherzer** – Policies – align with PPS – Farm sizes. Meet with planners on a regular basis. Planning 101 sessions. ED Working Group reports to Planning and ED Committee.

Encourage CIP's for Ag. Look at Meaford. Support value added uses and provide grants – app fees, bp's. County looking to build on program. Funding from County and push to locals.

Help set up or encourage clusters, list best practices and provide incubations.

Ex. Angel Investors – 18 investors for local projects.

Bluewater Wood Alliance – Members – look at best practices, seed funding.

Tourism

**Marcia Woods** – Freshspoke use sharing economy to make it work. Lots of one-on-one to make it work. Not enough data on Commercial

Connects people. \$\$ goes to producer. Buyers see price. Web store – run off of their own website.

County should create a culture of entrepreneurship by providing an opportunity to share resources and experiences. Accelerator for – resources and support. Need criteria as public money is involved.

Need processing space (shared) education, equipment and mentoring.

Micro loans – ok, but difficult with public \$. Ensure it is foundation and not “Bail-out”.

Facilitator to create food ecosystem – work with what you have. FOCUS. P3. Do not overregulate.

Grey needs to facilitate an enable.

Brand-Signs – quick wins.

**Elizabeth Cornish** – Local Strat Plan – leverage and promote existing festivals – Apple Pie, Saints and Sinners. Farmers market

Work with BIA to track tourism at local level.

Promote Food trucks.

Support for local gardens

Good social media presence.

Facilitate education – Work with on farm businesses.

Barriers – Internal communications with County and Farms – Difficult to communicate with landowners. Busy is barrier, jobs are tough to fill.

Look at promotional things like Blue pumpkins –

**Gary Gingras** – March 8, 2017 – Local food is expected to be everywhere! Looking to challenge local restaurants and producers to keep local food within local area and offer culinary challenges every season. E.g. Strawberry month...Restaurants make a Grey Strawberry dish.

Selling to the GTA...no one knows Grey County. Transportation to these markets make it difficult.

Promote area! Chef's Forum...failed as producers were weak link. Not willing to sell, promote, assist even though the Chefs were all onboard.

**Jenny Amy** – Co-chair for Grey/Bruce Culinary/Ag Association – Asset mapping is done. 140 members. 15,000 maps produced every year. – after first year, businesses think they had a 10-20% increase in visitation and sales.

Fields to fork dinners – done. Too many dinners being sponsored so their work is done.

Need to provide teaching opportunities. Loss of Food-link website...on their radar and would like to see it continue. GREY being INFO HUB – Will provide info/help and make connections.

Spruce the Bruce – micro grants. Look into model.

**Tony Bevan** – Promotion is needed. Need to find a way to get more people involved instead of the same people with the same ideas. Lack of coordination. Why open a new incubator kitchen when the College has an existing one? Need to partner. Need to coordinate goals, ideas and projects. Need to promote what is currently being offer in Grey – Asset mapping.

Build a digital map. Build an app. What is in season, where to buy, what to do...all related to local food.

Chefs want the local food, but have a difficult time sourcing it out. Distribution is a problem.

Partner with Georgian C. to build upon Saturday cooking where you showcase local food, cook it, taste it and take it home.

Micro grants or subsidies to assist college when buying specialty foods (pigs, etc.) to compare taste, texture, etc. Often specialty food is more expensive and it is difficult to justify the additional learning benefits from using the specialty foods.

**Roy Love** – Transportation is the biggest challenge. Has established business. He acts as a hub. 30 restaurants each has their own garden. He delivers and takes orders.

Problem...wants to see implementation. Too many meetings and studies...little action.

**Jim Halliday** – Problem is a central processing facility. Lots of small/med growers – nowhere to process and package. Looking for a common front to act on behalf of the entire area. Madeingrey.com

Issue with support from larger retailers.

Need to implement strategies. Look at a store for local food.

**Nicole Van Quaethem** - SCOR – Foodhub – Started by Erie Innovation – given to SCOR. Now looking to transition out of the business. What to shift to producers, but no interest. Now looking to build relationships to transition out. Huge area! 4 large counties. Deliveries are an issue. Operates – ad-hoc.

Online market – several hubs. Even eliminating the hub and making connections with producers and buyers. Successful partnerships with institutions. Several hubs are actually larger producers with storage.

**Glenn Walker** – Does not feel connected to his Ag. Community. Does not have a lot of restaurants. Focus on local event, however, he partners with other County. Feels somewhat disconnected to the other parts of Grey.

Looking for ways to obtain information, knowledge and to learn from other in the County. Simple things like how to draft print material for tourism, setting up an on-farm business, etc.

Strange planning policies need to be updated. For example, why restrict a secondary farm business to a maximum of 5 employees? Or restrict the size of a secondary building.

They have lots of Mennonite farmers, technology and information sharing can be an issue due to distance travelled, etc.

**Barb Shopland** – County should focus more on the Business Side – to take on a true ED role and not spend as much time with social projects and NFP's as these organizations can take up too much time. Perhaps build a NFP committee so they can work together. County could facilitate committee but cannot act as a point person to assist with their programs. The County could find a different approach or hire someone to assist the social programs and NFPs.

Country should act as a hub for information and to make connections. Community leadership role.

Some businesses are not working well together, need a bridge. County needs focus, what needs to be done and determine what they are not doing.

**Steve Murray** – Great job with the big festivals.

Great partnership with the Ag 4.0. Meaford is taking the lead for the CIP on farmland. County should take model and assist other lower tiers to set up program.

County should promote Grey. What makes it special, why grow here? What are the soil types, what is working? Conduct a tour of the county to “court” new farms and farmers.

Build on their Scarecrow festival, need to connect with restaurants to build upon the tourism draw to see the scarecrows. Need tourists to stay longer. Create fall festival.

**Agatha Podgorski** – Grey is the next Prince Edward County for local food. Accommodation is an issue in the County.

Not the responsibility of the County to assist with grant writing and assistance for NFP.

County needs to connect, promote – Business attraction, and be the data bank. They are doing this, but clearly, not everybody is aware of their activities.

They need to host events, clusters to engage people, build relationships and share ideas.

Build upon the successful events. Support communications not necessarily promotion of these events.

Do a “media tour” for the local champions. Turn locals into ambassadors.

Partner with Simcoe lots going on with Simcoe Local food. Growth area for the province.

Food hub is a great idea...transportation and distribution will always be a problem. Need a solution to do their own.

**Keith Reid** - Promote the usage of ALUS – look to larger farms for champions.

County can assist with GIS and mapping capabilities for ALUS program.

Difficult for the County to look into local food until the ag system has been reviewed. Assist with providing the tools or linkages to shift from commodity based agriculture to manufactured goods.

Draw on current environmental components, promote producers, target consumers.

Made in Grey Promotion. Similar to small emblem on Norfolk wine growers.

**Anita DeJong** – County should be a central information hub to the ag community. Find ways to improve or facilitate communication, web presence and promotional material – Grey County magazine.

Integrate Planning, Ec Dev and agriculture.

Provide assistance with coordinating feasibility studies (i.e. slaughter plant) – make these studies visible and accessible to public.

If a food distribution system is not feasible, why put more money into the program? Share the info as to why previous projects failed, or why certain projects are simply not feasible.

Grey can help with the asset mapping. Use the Ag. Culinary Association Map as a start.