



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.



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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.



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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.¹

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
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 Grey County, "Made in Grey" Economic Development Strategy, April 2015, pg 17.



CHAPTER 1 INTRODUCTION

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 data² 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.

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



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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 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 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.

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



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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.

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.

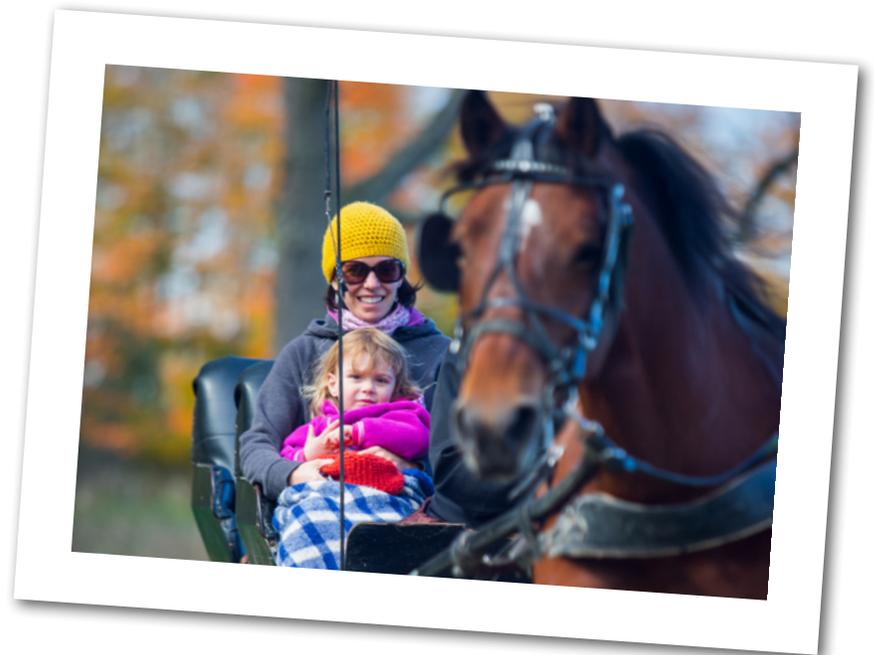


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Regardless, the profiles provide some insights that should inform the local agri-food strategy. They underscore the point that there are geographical variations in type and scale of production across the County and raise questions about the rate at 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.





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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 Suppliers⁴

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.

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



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

OCCUPATION	%
Farms	-13%
Grocery Stores	-22%
Travel Accommodation	45%
Restaurants	34%
Dairy Manufacturing	73%

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.



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

OCCUPATION	%
Restaurant Managers	-29%
Managers in Agriculture	-26%
Bakers	-39%
Food & Beverage Servers	-25%
Butchers - Local	14%
Butchers - Industrial	-75%

OCCUPATION	%
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 Southgate, 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.



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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.



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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.



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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, RTO7 (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.



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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.



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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



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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 RTO7 (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 year, 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.



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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 farmers' markets: Grey County should support all local farmers' 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.



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6. Connect the agri-food system and create a communication hub: This could accomplish five things:
 - Create a purchasing network of producers with small stands or small stores.
 - Provide recycling opportunities to connect farmers to groups like foodbanks.
 - Connect the agri-food system by aligning partnerships of producers, distributors, and processors.
 - Create an inventory of products/farms/experiences.
 - 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 stakeholders 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



CHAPTER 3

INPUT FROM LOCAL FOOD STAKEHOLDERS IN GREY COUNTY

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.



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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 farmers’ 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.



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INPUT FROM LOCAL FOOD STAKEHOLDERS 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

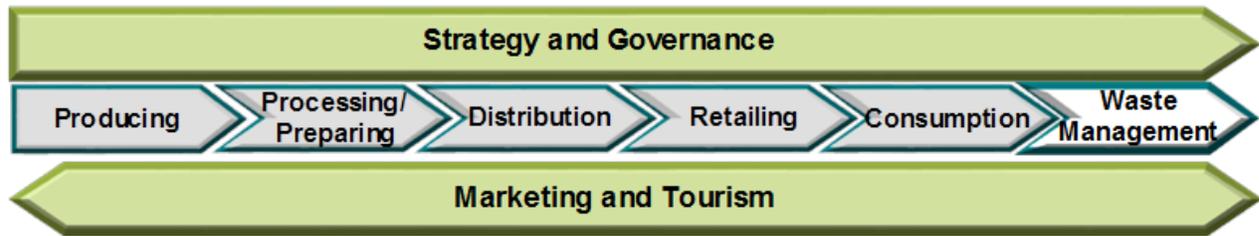
Many respondents stressed the need for sustainable farming practices to be promoted and supported within Grey County. Of particular concern was soil stewardship and the need to preserve the County's unique agricultural environment to ensure the longevity of local food production. Education, grants, and 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 THE VALUE CHAIN CURRENT STATUS

4.1 VALUE CHAIN ANALYSIS

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.⁵

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.

⁵ Deloitte, “Best Practises in Local Food” 2013, pg 2.



CHAPTER 4 THE VALUE CHAIN CURRENT STATUS

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.

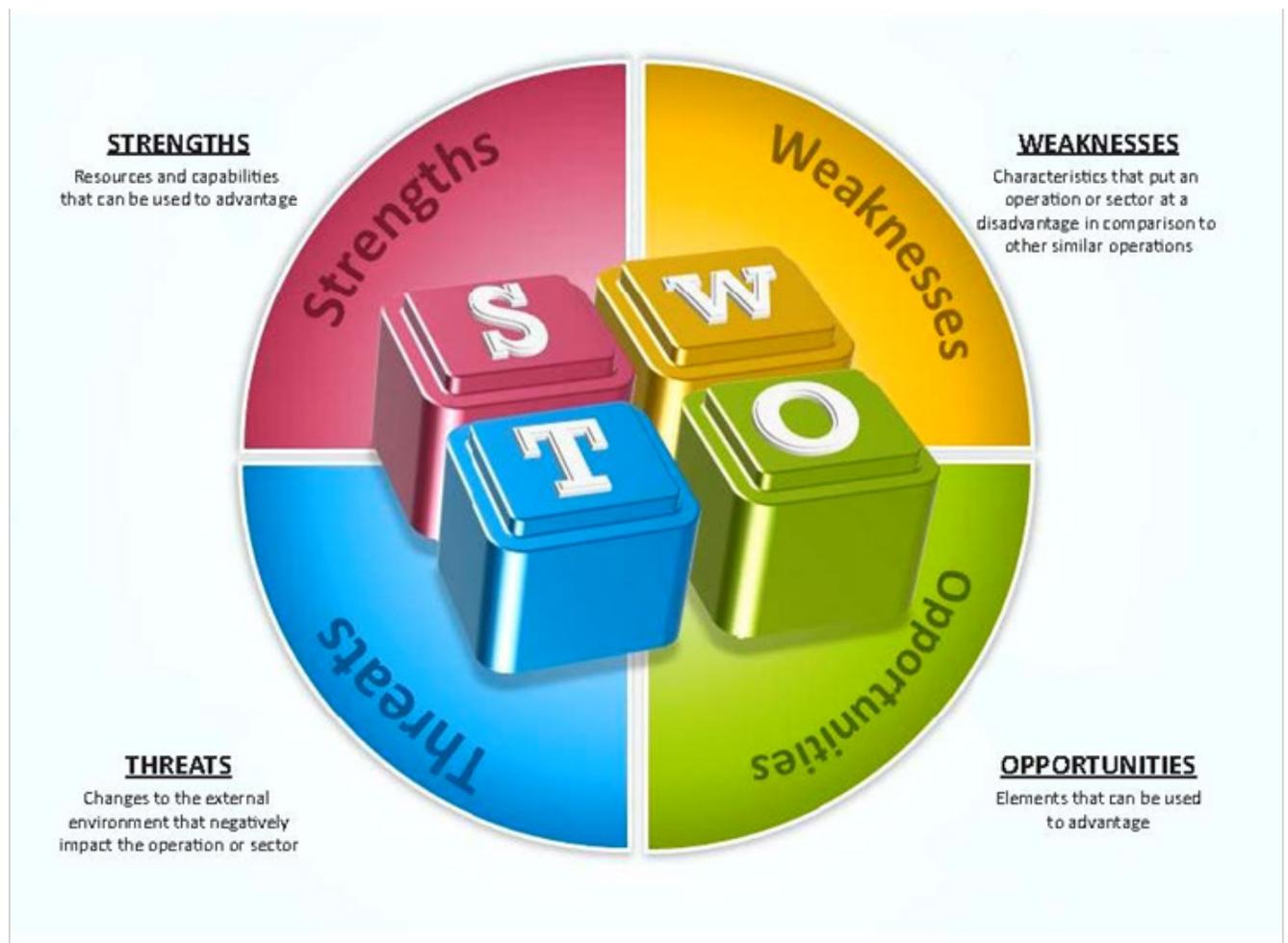




CHAPTER 4 THE VALUE CHAIN CURRENT STATUS

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.





CHAPTER 4 THE VALUE CHAIN CURRENT STATUS

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.)



CHAPTER 4

THE VALUE CHAIN CURRENT STATUS

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



CHAPTER 4

THE VALUE CHAIN CURRENT STATUS

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



CHAPTER 5 A STRATEGIC PLAN TO SUPPORT THE AGRI-FOOD AND LOCAL FOOD SECTORS IN GREY COUNTY

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

A photograph of a large, arched metal structure with the words 'KEEDY MARKET' written across it in a stylized font. The arch is set against a clear blue sky. To the right, a wooden signpost is partially visible with the text '100% FARMER'.

CHAPTER 5

A STRATEGIC PLAN TO SUPPORT THE AGRI-FOOD AND LOCAL FOOD SECTORS IN GREY COUNTY

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.



CHAPTER 5 A STRATEGIC PLAN TO SUPPORT THE AGRI-FOOD AND LOCAL FOOD SECTORS IN GREY COUNTY

ACTIONS	TASKS
A. PROVIDE TARGETED SUPPORT TO STRENGTHEN THE COUNTY'S AGRICULTURAL SECTOR	
1. Track changes in the sector.	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.
2. Support efforts to protect and expand the land base under production.	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.
3. Support innovative programming.	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.
4. Support the agri-food sector through infrastructure planning.	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.



CHAPTER 5

A STRATEGIC PLAN TO SUPPORT THE AGRI-FOOD AND LOCAL FOOD SECTORS IN GREY COUNTY

ACTIONS	TASKS
B. COORDINATE SERVICES TO ENSURE GAPS ARE ADDRESSED	
1. Establish and maintain an agri-food assets map.	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.
2. Identify gaps.	2.1 Using the asset map and the analysis provided in this report identify gaps in the value chain.
3. Establish prioritized, targeted program to address significant gaps.	3.1 Assess critical gaps in the value chain and, based on maximum return and minimum input, support key programs to address these gaps.
4. Prepare an annual report card to evaluate achievements and identify appropriate adjustments.	4.1 Prepare an annual report card based on established indicators to track the health of the County's agri-food sector.
C. SUPPORT INNOVATION	
1. Provide targeted support (seed money, local food fund, incubation facility) for businesses identified as critical to the agri-food sector.	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.
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 Foodlink to establish digital database and up-to-date, user friendly, publicly accessible mapping of the agri-food system.



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ACTIONS	TASKS
D. PROMOTE LOCAL PRODUCT	
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).
E. BUILD PROGRAMMING PARTNERSHIPS	
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).
2. Ensure internal coordination of planning, tourism, and economic development support for agri-food.	2.1 Create an internal county staff based review process to coordinate actions and programming between tourism, planning, and economic development at the County.



CHAPTER 5 A STRATEGIC PLAN TO SUPPORT THE AGRI-FOOD AND LOCAL FOOD SECTORS IN GREY COUNTY

ACTIONS	TASKS
F. FACILITATE LINKS BETWEEN PRODUCERS AND CONSUMERS	
1. Use past experience and related resources to promote linkages.	1.1 Building on analysis of successes and failures, establish best practices for creating and maintaining linkages throughout the value chain.
2. Support networking by making County resources available to assist in establishing and maintaining linkages.	2.1 Based on established best practices, allocate resources to incubate independent networking services that will become self-sustaining.



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