



Increasing the Market Opportunities for Local Food

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This commentary is the second of a two-part series designed to help bring some much-needed objectiveness to the debate surrounding the topic of Local Food. The report focuses on identifying ways the agriculture and food system can better exploit consumers' increasing interest in local food. The first commentary focused on consumer trends and drivers of purchasing behaviour.

The first paper in this series demonstrated that while consumer interest in local food is undoubtedly increasing, interest does not automatically translate into buying behaviour. It also described consumer interest in 'local' as a symptom of a series of interconnected social trends, and food purchasing as a complex decision process. Therefore, local is not THE driver of behaviour.

This paper moves beyond focusing on consumers to discuss ways Canadian agricultural production and food distribution systems could be redesigned to develop capabilities that take advantage of current and emerging market opportunities. Specifically, how farmers, packers, shippers, wholesalers, distributors, food processors/manufacturers, retailers, foodservice operators and other institutions can overcome barriers that either prevent or at least discourage them from innovating to take advantage of opportunities presented by increasing consumer interest.

To serve as an example of what could be achieved in Ontario or other parts of Canada, this paper also describes a number of successful initiatives that have led to increased local and regional market share in other countries.

Incorrect Business Model

Time and again, many local food initiatives fail by attempting to expand social models that are suited to individual operators or niche markets, but are not suited to competing in a mass commercial market. Essentially, whether a local or regional food initiative is **successful relies upon its ability to be a commercially operated and managed venture**. Initiatives that have failed altogether or failed to achieve their full potential are those that have not implemented the appropriate governance structures to produce what is actually desired by consumers (Heslop, 2007), or are not able to implement the necessary management practices due to interference by third parties (Gooch et al, 2009b; Morgan, 2008; Fell & Russell, 2000).

Many local food initiatives are characterised by the same factors that typify emerging industries. Perhaps this is because they often unwittingly perceive local food to be an emerging industry. Characteristics associated with emerging industries include pricing models that do not reflect market values and, therefore, prevent communication among all the participants in the entire value chain, as well as ineffective governance systems, and a general lack of management capabilities (Collins, 2009). However, it is not that local food is emerging or even re-emerging. Instead it is more a case where much of the agricultural and agri-food industry has not kept pace with international developments and competitors, or has placed too much faith in using political or regulatory approaches to retain market share (McGregor, 2002; Curry, 2002). Researchers, including Tamilya and Charlebois (2007) and Martin (2007), have stated that this scenario has been exacerbated in Canada by Federal and Provincial governments systematically failing to create an environment where businesses are motivated or enabled to innovate in relation to market demands.

Benjamin Dent, Chairman of the Kent Farmers' Market Association (UK), says that while there is scope for socially motivated enterprises to help address the current situation, the key is to make sure they work commercially and are given incentives to grow. A UK example of this type of enterprise is Community Interest Companies (CICs). CICs are limited companies, created for people who want to conduct a business or other activity for community benefit, and not purely for private advantage. This is achieved by a "community interest test" and "asset lock", which ensures that the CIC is established for community purposes and that the assets and profits are dedicated to these purposes. Employees and owners still earn a commercially competitive wage but they benefit from certain regulations because they reinvest profits back into the company's growth, and some of their outcomes are external (Dent, 2010; CIC, 2010).

Gooch et al (2009b) also identified that the adoption of incorrect business models is frequently a reflection of primary **producers tending to be entrepreneurial, product-focused and independently-minded**. This often stems from a lack of knowledge regarding best practices, labeling laws, specific trade requirements, grading standards, food safety and traceability regulations, logistics, supply volume and rotation, required internal and external marketing programs and billing/payment mandates, to name a few. This knowledge is required to plan, market and communicate effectively with all other members of the value chain to develop appropriate products. While research consistently shows that many producers do not wish to invest time or money toward increasing their knowledge and network, the Ontario producers who do invest are severely limited by the lack of an appropriate 'one stop shop' to assist them with the process beyond their own link in the value chain. This leads to fewer producers and smaller organizations possessing the necessary attitudes, capabilities and understanding required to successfully supply a continually consolidating and evolving customer base.

Barriers to Profitable Local Food Distribution in Canada

In Canada there are numerous regulatory, structural and attitudinal barriers that limit the development of profitable local food distribution systems.

Legislation/Regulation

While federal, provincial and municipal governments are encouraging consumers to choose local food, legislation implemented by those same levels of government often works against businesses wishing to take advantage of consumers' increasing interest in local food.

The Alliance of Ontario Food Processors (AOFPP, 2008), along with researchers such as Stiefelmeyer *et al* (2008) and Gooch *et al* (2005), reported that while demand for foods offering health benefits and added authenticity is soaring, current regulations and legislation result in the food and beverage processing industries having limited ability to exploit market opportunities compared to jurisdictions such as France, Australia and the UK.

However, it is often the unintended consequences of regulations and legislation, rather than their purpose that have the greatest impact on limiting the agri-food sector's ability to exploit market opportunities. A particular case in point is how legislated marketing prevents market signals from being transmitted and/or acted upon. Marketing boards, many of which were designed to suit an era that is very different to today's economy, often lead to disconnects occurring between producers and the end market. What emerges is an unresponsive system that lacks innovation and strategic foresight because marketing boards too often invest their financial resources in maintaining the status quo rather than fostering long-term innovation. Examples where this occurs are described in Gooch et al (2009a) and Tamilia & Charlebois (2007). The latter researchers also cited how marketing boards force business to take a sector-level approach, rather than supporting and enabling businesses to actively differentiate in relation to market opportunities.

Other examples of the 'array of legislation' (OMAFRA, 2010) that directly limits the ability of businesses to market products in line with changing demographics, instead creating a maze of often unnecessary red tape, include the *Canada Agricultural Products Act*, the *Food and Drugs Act*, and the *Consumer Packaging and Labeling Act*. Even suppliers wishing to accomplish something as straightforward as changing a package size or format are hampered. Heaven forbid a segment of consumers might actually want a product, fresh or processed, in a different package size or format from what has been mandated by legislation!

In meat, an illustration of unintended consequences of regulations and legislation is the effect that federal versus provincial licensing of meat plants has on limiting many processors' access to markets. While corporate customers may be reluctant to source meat from provincially-inspected processors for valid reasons (such as their inability to supply at the required volumes, or genuine concerns about food safety) it's more often the unknown about precisely what standards a particular processor is operating under, or the fear of getting caught accidentally having shipped a provincially-inspected product to another province. While in other jurisdictions it is often smaller processors who are most able and willing to supply emerging or niche markets, the natural tendency of current legislation is to discourage interprovincial customers from providing these suppliers with a route to what could amount to a significant and potentially lucrative market opportunity.

A further example of regulations that have a negative impact, particularly on smaller business access to markets, stems from current alcohol-related legislation. In Ontario, the large wineries have a grandfathered ability to establish and operate their own retail outlets. Yet current regulations would prevent a group of small wineries from cooperating to open shared retail outlets, even though this would provide an opportunity to establish a potentially lucrative niche market. The result is that smaller Ontario wineries have far fewer opportunities to expand and market their wines through innovative business models than other jurisdictions, such as New Zealand, Australia, UK, US, Brazil, Argentina and France.

Infrastructure

The **erosion of local infrastructure, or lack of motivation to adapt to business models more suited to the current trading environment, is also a major concern in Ontario.** This is particularly true for the infrastructure relating to the distribution of fruits and vegetables, which have been identified as the products most likely to be successful at a local level (Gooch et al, 2009b; Gooch & Moore, 2006). One example is the continuation of a fragmented infrastructure composed of multiple small packers with limited technical or management resources and negligible standard operating procedures. A more suitable alternative would be the development of a few sophisticated capable packers with highly-honed, market-focused processes and resources, which would directly impact the efficiency and effectiveness of the fresh produce industry (Deloitte, 2010; Gooch et al, 2009).

Other challenges stem from ways in which current infrastructure is managed, thereby restricting the access, particularly for smaller suppliers, to mainstream markets. Part of this problem is said to stem from a number of corporate distributors and retailers sharing the same ownership structure (Anonymous A, 2010). While corporate distributor reluctance to handle local and regional products may be attributed to a number of factors (including, as previously mentioned, the unintended consequences of current legislation and regulations - such as those pertaining to meat processing), the primary reason may stem from differences in the ways independent and corporate businesses approach the topic of increasing consumer interest in local food (Gooch et al, 2009).

For example, as identified in research by Gooch et al (2009b), independent distributors view local food products as a means to *increase* their market share by actively differentiating themselves from their larger competitors. As a result, they are often more enthusiastic about remaining ahead of the curve by sourcing a variety of foods locally, not just produce. Corporate distributors, on the other hand, generally tend to perceive the need to source and market local food as a method of *defending* their market share. They, therefore, may be less enthusiastic and committed to sourcing and handling local food, particularly items other than produce. As well, it is only natural that distributors under the same corporate ownership as retailers would require a clearer financial reason to embark on a strategy that might benefit competing retailers.

Access to finance

Lack of available **financing** is an issue that impacts the ability of many businesses to adapt. For commercial organizations it is difficult to access the funds necessary to expand or establish a local food distribution initiative, resulting in lost opportunities. There are several reasons for the difficulties in securing funding, including the fact that local food initiatives are relatively new. As such, they do not have lengthy records of success, so lack the business information and history necessary to secure loans from traditional sources.

The financial challenges facing commercial local food distributors can be exacerbated by a lack of success in accessing government grant money, due to the fact that they exist 'for profit' rather than for specific political, environmental or social gains (McKittrick, 2010). With the possible exception of the Broader Public Sector Investment Fund (Ontario), which was announced on October 4, 2010, government funding tends to reward projects, rather than provide core funding; seeks to capture political support, rather than enable ground-breaking developments; and makes funding applications an arduous and time-consuming process. This situation often stems from the fact that funding decisions related to local food distribution are often driven by politics, rather than market realities. Therefore, they frequently tend to be risk averse, and create bureaucracy that overwhelms the investments available (Dent 2010; Gooch et al, 2009b).

This has led to a political focus on promoting local through relatively minor channels, such as farmers markets, or the provision of funding through industry associations (often because they are high profile, and viewed as potential vote-winners). Unfortunately, such funding is often ineffective as it is not used to establish much-needed infrastructure or develop the management capabilities required to achieve sustainable commercial innovation. As well, should political support shift, the funding stops or is cut, and any progress loses momentum. This helps explain why **most local food programs, many of which are dependent on such financial support, are not sustainable in the long term.**

Attitude

While consolidation at the retail level has created challenges for many suppliers, it creates the greatest number of issues for those unable or unwilling to adapt to change. Lack of willingness to collaborate reflects another industry weakness, cited by among others, AOFB, which is the antagonistic **relationship that often exists between farmers and processors.** Although they depend on each other, interactions are strained by continuous conflict over prices and increasing pressure to compete in a global market. Much of this conflict is due to perceptions and assumptions, which flow directly from a lack of understanding for another participant [link] in the chain, as well as the inability or lack of motivation for businesses operating at different levels of the value chain to communicate effectively.

Research by the Value Chain Management Centre (2009b) supported the findings of others (for example Bolhjie, 2006; Johnson, 2007; Morgan, 2007; Oram, 2008; Taylor and Fearn, 2006) who identified the following: **the often adversarial relationships that typify the agricultural and agri-food sector result from members of the value chain possessing distinctly different attitudes.** These researchers also found that the challenge of addressing these differences is exacerbated by agriculture exhibiting a conservative culture, which precludes many farmers from identifying a need to readily connect with the end market. In finding that **the same factors negatively impact the development of the local and regional food movement,** English Food and Farming Partnerships stated that farmers "have to recognise that the attitudes and business practices that served well in an era of protection and price support are unlikely to be appropriate in the future" (EFFP, 2003:3).

The Gooch et al (2009b) study found that Ontario farmers have varying takes on the local food opportunity. Most agree that strengthening the local food industry is a great market opportunity, with

some producers taking a proactive approach. These farmers believe that local food distribution improvements could enhance their ability to better respond to consumer demands (51%), as well as their ability to differentiate themselves (41 %) from non-local providers. Unfortunately, a considerable number of farmers were found to hold a rather opposing and non-constructive point of view. Fifty-seven percent said they believed supplying the local food market meant they would receive more money for what they currently do, 45% believed it would enhance the security of their market, and 31% said that supplying the local market meant they *didn't* have to comply with stricter food quality standards [perhaps associated with commercial retail or food service outlets]. Essentially, these farmers believe the local food market will help them sell what they already produce, at higher prices and without further innovation. At some point the question must be addressed: When do we stop allowing those who do not possess a proactive mindset to compromise the development of more effective local and regional food distribution systems?

Interestingly, these beliefs do not correlate to the findings presented in the first paper in this series, (which outlined that today's consumers expect not one, but a number of attributes in the products they buy such as freshness, taste, nutrition, convenience). Therefore, the challenge facing the agri-food industry in developing the local food market is how it can adopt a more cohesive and responsible approach to the production, packaging, shipping, retailing and promotion of local food throughout the value chain. This is difficult when the approaches used must reflect a corporate commitment to sustainability, while maintaining the focus on health, wellness and experience as the primary motivator for consumer willingness to purchase local foods (Gooch et al, 2009).

Overcoming the barriers

So, how might the distribution systems and overall industry be realigned to enable more effective distribution of local foods, resulting in an increase in market share and a strengthened economy?

Perhaps the greatest change must come from how we define the focus of our discussions. The term 'local' means different things to different people. It will even mean different things to the same person according to the product or meal occasion. And, as identified in Local Food Part 1, the vast majority of consumer interest in local is driven by a host of factors, many of which relate to seeking authenticity. **As 'local' is apparently an entirely ephemeral construct, why do we allow opportunities to be limited by pointless legislation or social constructs that have little place in commercial reality?**

Instead of focusing firmly on local, the primary focus should be on regional. Regional approaches enable the development of more economically viable approaches (Clancy & Ruhf, 2010; Gooch et al, 2009). If sufficient commercial reasons exist to differentiate a product by a specific locality within that region, then do so. Forcing an entire system to operate on a local level is a setup for failure before it's even begun, particularly if it is operated with an overtly political influence.

Working together through the Chain

A study by Gooch et al (2009) identified that the majority of customers, together supplying more than 85% of Ontario agri-food market through retail and foodservice, see a need for a more effective regional food system than currently exists, and that a regional food distribution system should complement what already exists by connecting current infrastructure in new and innovative ways.

Mass retail is undoubtedly the best means by which to rapidly expand the local/regional food market. A significant challenge faced by large retailers in Canada who want to expand their local/regional food offerings is how they deal with an expanded base of smaller-scale local producers, many of whom possess limited quantity, resources and capabilities. Working with a fragmented group of regional/local suppliers with varying capacities and attitudes, as well as multiple procedural and purchasing infrastructures, is the antithesis of the benefits that come from the economies of scale provided by centralized operations.

If we use the UK as a case study, virtually all the major supermarkets have, out of necessity, developed the capabilities to overcome barriers that occur naturally from handling economies of scale, resulting in a greater ability to source and stock a growing range of local foods differing by region. Asda, the UK subsidiary of Wal-Mart, has addressed this challenge by establishing a nine-strong hub system that operates as a series of independent businesses (Ryan, 2010). In place since 2002, the system has enabled the retailer to establish 14 different regional offerings across the UK. The hubs work directly with local suppliers to identify products suited for retailing through Asda, guide suppliers through the chain's accreditation process, and act as a single distribution point for that region. Beyond **enabling Asda to retail several thousand local products across its hundreds of stores**, the system saves an average of three million food miles per year (FJP, 2009). That's just in the UK. Imagine the food miles that could be eradicated if a similar system was used in a country the size of Canada?

Practical Government Support that tackles the Challenges

Many of the barriers that exist in the Canadian environment could be overcome by learning from international success stories, particularly in terms of how government funded initiatives can lead to real improvements in the business skills of stakeholders, as well as the physical infrastructure required to support local food development.

The Asda system was developed through the groundbreaking work of a supplier. With the aim of providing top quality processing and retail facilities for himself and other local producers, in 2001 a Cumbrian farmer named John Geldard (Low Foulshaw Farm) applied for and received an EU grant of £228,500 to help fund the conversion of existing traditional buildings into a Farm Shop and Food Park. The application was submitted in early 2001 and approved within three months of receipt. The food park now provides workshops for about 20 local small-scale producers to process products from their own farms, and the farm shop provides a facility for on-site sales. With the opening of the farm shop and food park, Plumgarths entered into an arrangement to supply the Asda store in Kendal with locally sourced products as part of the Asda Local Food Sourcing Initiative. The initiative was such a success that Asda replicated the approach with leading regional suppliers located across the UK. John's own Plumgarths Cumberland sausages are now sold in Asda stores nationwide (Asda, 2010; Bridge, 2008; DEFRA release, 2009).

Another EU initiative that has assisted producer access to mass retail and other markets is the Fruit and Vegetable Regime (EU Commission, 2003). It provides financial support to help producer cooperatives develop the capabilities required to become more competitive links in the value chain. The Scheme funds up to 50% of the costs associated with such items as marketing, quality assurance (benchmarking), research and development, as well as necessary business improvements, such as capital investments etc.

English Food and Farming Partnerships, an initiative established solely to provide producers with the capability and support required to reconnect with the food chain and end markets, has achieved considerable success since its inception in 2003. Beyond producing case studies of farmers who have benefitted financially by connecting with other members of the value chain, it has also supported development of local and regional food initiatives. One example is the assistance to **300 East Anglian grain producers who connected with Whitworth's (miller) to supply Sainsbury's with flour for its in-store bakeries**. The project resulted in the entire chain, from producers through to retailers, possessing the capabilities and motivation to innovate in relation to market demands and save costs.

Another capacity-building initiative, Heart of England Fine Foods (HEFF), has received substantial government support since its inception in 1998¹. HEFF works to increase the business, innovation and

¹ Eleven million GBP were invested into the Shropshire Food Enterprise Centre.

marketing capability of producers, growers and processors of speciality food and drink products based in Herefordshire, Shropshire, Staffordshire and the Midlands. They also provide training and support in functional areas including labeling, trading standards, health and safety, delivery, supply, and invoicing. They achieve this by offering practical business support and training in disciplines such as logistics, marketing, financial management, and food safety. Their collaborative delivery service provides a route to market for producer members and meets the demands of retail and food service buyers who require one order, one delivery and one invoice for a range of regional products. This service has been so successful that it was awarded the 2009 Institute of Grocery Distribution (IGD) Award for Sustainable Distribution (HEFF website, 2010). Its market presence has been further strengthened through providing independent retailers with in-store branded refrigeration units at no charge.

These initiatives are just three that illustrate how public money can be used to address the issues related to infrastructure, attitudes, and skill gaps that exist and limit the current local food opportunities in Canada. However, it is not up to government alone to solve the existing problems.

In Canada, programs designed to enable suppliers to develop innovative capabilities and strengthen relationships with major retailers remain in infancy. **The VCMC is working with producers, Vineland Growers Cooperative, and Loblaws to improve the quality and value of peaches grown in the Niagara region.** Yet this is just one example of the many thousands of opportunities that exist for businesses to take the initiative toward working together to take advantage of increasing consumer interest in local food. It also reflects the existing need for government-funded projects that will successfully increase stakeholder business skills and knowledge, as well as the physical infrastructure required to support local food development. However, government investments that directly support the development of business capabilities and attitudes, along with infrastructure, trail those of many other jurisdictions.

Focus on Quality

Research conducted by the VCMC (for example Clark et al, 2009; Gooch et al, 2009b; Gooch et al, 2009c) consistently shows that consumers consider eating quality to have considerably more influence on their purchasing decisions than provenance. The same applies if the product is processed or fresh, meat or fruit. The most successful local products are essentially those bought because they have a Unique Value Proposition (UVP) that appeals to a specific consumer segment. The general rules of business survival are the same for the local market as for any other market (Prevor, 2010). **Local initiatives must follow a commercial model** and have the appropriate governance to manage product consistency and continuity as well as clear communications, expectations and ultimately, trusting relationships through the chain.

Market research consistently identifies that consumers place greater value and credibility on source verification systems when products are differentiated based on quality (particularly taste and eating quality), and the integrity of the system is audited by a third-party (Fanatico and Born, 2002; Gooch et al, 2009b). Perhaps, then, the single most important factor to the success of the local food market is the ability of the participants to **focus on providing objective quality factors that appeal to consumers, not the suppliers.** This realization would require them to have sufficient knowledge and skills to continually understand what is desired and valued in the market, and to supply those products consistently with the motivation to act upon consumer feedback uniformly. This understanding is critical to the long-term viability of any initiative, and further highlights the value of initiatives such as HEFF and the need to involve only those possessing the required attitudes, knowledge, capabilities and mindsets.

How to Label Local?

Giovannucci, Barham and Pirog (2009) argue that intellectual property mechanisms, such as patents and trademarks, helped to facilitate the globalization of the food industry and its divorce from a local context. However, as seen in the examples below of Protected Designation of Origin (PDO) status in the EU and

Label Rouge in France, these mechanisms may be a significant and valuable way of differentiating 'local' in the current environment. This is because, in order for local products to thrive in mainstream and larger commercial channels, they must be properly identified and credibly conveyed to consumers. This cannot be achieved by voluntary standards or labeling alone. Consumers need more safeguards to ensure credibility and trust as products move through complex and distant distribution and marketing channels.

This belief appears to be echoed by David Hartley, the managing director of Wensleydale Creamery in the UK. Ninety-five percent of his company's 21 million GBP annual turnover is earned from producing "territorial" cheese. According to him, **"local is about authenticity, not the number of miles between source of production and point of sale. It's about local milk going into local cheese and being sold nationally"** (Scott, 2010). To give greater credence to his product's authenticity, this company has spent thousands of pounds over six years to achieve PDO status. Hartley hopes this will help him grow sales within his local region of Yorkshire, as well as in the national market. It is also expected to help protect his products from competitors who currently piggyback on his brand.

Another successful geographically-based initiative is Label Rouge in France. To carry the Label Rouge, products must prove that **a link exists between a specific geographic region and specific quality attributes, resulting in consumer-recognised value.** Perhaps the most successful Label Rouge product is Label Rouge chicken, established more 40 years ago. It has developed a good reputation in the consumer market for possessing distinct quality and taste attributes. Its authenticity is guaranteed through every step in the production of the final product and is verified by an independent third party. The initiative has remained current by evolving to suit changing market demands. In the case of Label Rouge chickens, suppliers benefit from Label Rouge chickens owning 30% of the market by volume and 60% of the market by value. This equates to a 100% premium relative to competing commodity chicken (Hayes, 2005).

Conclusion

In Canada there are many challenges standing in the way of the local food movement, but other countries and regions have shown that these can be addressed and commercial success can be achieved. Essentially, the success of marketing any product is reliant upon managing the five "C's" well: communication, continuity, consistency, co-operation and controls.

The most successful local products have been developed by managers with the drive, skills and knowledge to deliver what appeals to consumers. Instilling and conveying these capabilities to a wider segment of the population should be the focus for local or regional programs, particularly since the rules of business survival are the same for the local market as for any other market.

About the Authors

*The **Value Chain Management Centre** is the only Canadian organization dedicated to researching value chain issues and opportunities, and assisting businesses implement value chain initiatives. The Centre has considerable experience researching issues and opportunities relating to the production, distribution and marketing of food in Canada and elsewhere. Its personnel have assisted the development of value chain initiatives that have won domestic and international awards of excellence. Visit www.vcmtools.com for additional information.*

***Faye Clack Communications Inc.** has more than 37 years of experience promoting local, national and international fresh fruits and vegetables. Their success stems from their ability to identify communications opportunities and creatively implement solutions that meet client needs, reflecting their passion and knowledge for the entire food industry value chain. Their company mission is to help people make better food choices by understanding, connecting and representing growers, retailers and consumers in a shared food experience that benefits their individual needs.*

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