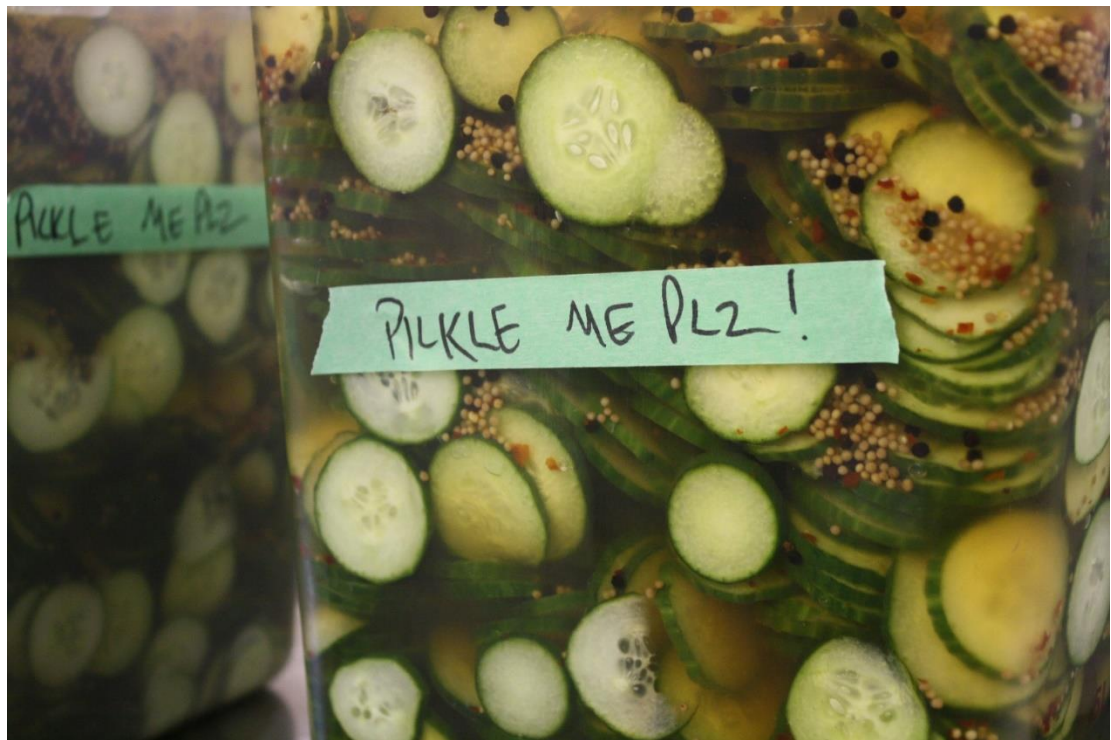




MANITOBA ON THE MENU



Exploring Local and Sustainable Food Procurement in Manitoba Institutions



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MANITOBA ON THE MENU

Exploring Local and Sustainable Food Procurement in Manitoba Institutions

Executive Summary

Manitoba's institutions can play a catalyzing role in the growth and viability of a vibrant local food economy. Schools, post-secondary, healthcare institutions and Crown corporations collectively purchase millions of dollars' worth of food annually, yet little has been known about how much locally grown food is purchased by these institutions or what is needed to reach this potential. Without this knowledge it was difficult to determine what possibilities exist for local and sustainable foods in Manitoba's institutions. The reality is that institutions are currently purchasing very little locally and sustainably produced and processed food, representing a significant missed opportunity to strengthen Manitoba's local food sector.

Food Matters Manitoba's Manitoba on the Menu pilot was funded by Manitoba Agriculture, Food and Rural Development to better understand the current procurement of local, sustainable foods and identify opportunities to increase the purchase of local, sustainable foods by Manitoba institutions. The pilot worked with institutions who voluntarily participated to analyze existing local and sustainable food purchasing, identify opportunities for those institutions to increase local procurement, and held events and consultations to facilitate increased local and sustainable food procurement.

Baseline data was collected from eight government and non-government institutions representing approximately \$5 million of annual food purchases. These institutions ranged in size and included a Crown corporation, educational facilities and a healthcare facility. They demonstrated the wide range of existing purchasing practices that exist at different scales of institutions, including working with major full-line distributors, food service management companies and purchasing directly from producers, processors, or stores. Percentages of local and sustainable food were measured over an average time period of six months. Local and sustainable food purchases ranged widely from two percent to over 60 percent.

Although one large post-secondary institution (University of Winnipeg) and a secondary school food program (Sisler High School) demonstrate that high levels of local, sustainable purchasing are possible, most participating institutions had low levels of local food purchasing and very low levels of local and sustainable food purchasing. A number of common but complex challenges impact local food procurement including financial limitations, time, labour issues, contractual agreements, lack of administrative support, and perceptions of food safety. These are among the key reasons why many independent local producers and processors remain underrepresented in institutional procurement.

Nevertheless, these barriers are not insurmountable. Manitoba Liquor & Lotteries provides an example of how a major institution can make changes that increase local food procurement. During the duration of this project, their local food purchasing doubled to nearly 20 percent. Given their annual food budget is

approximately \$4 million this shift in purchasing has created new market opportunities for local food businesses.

The impacts of climate change are being recognized and local food production and procurement are strategies being recognized by the province of Manitoba as a way to reduce greenhouse gas emissions and work towards becoming a carbon neutral province. As part of its strategy to reduce greenhouse gas emissions, the province of Manitoba has committed to purchasing 20 percent local food.

This policy provides a significant opportunity for local producers and processors. However, support and collaboration is still needed between many stakeholders, including consumers to institutions and the government. For local, sustainable foods to be successful in Manitoba's institutions there needs to be consumer demand and supportive kitchen staff and administrators. This will enable an institution to re-think food service contracts, identify local products to add to their food offerings, create internal policies that guide purchasing decisions and establish procurement targets. Government can play a role by supporting smaller-scale specialty producers in accessing distribution networks, and in further supporting policies that guide purchasing decisions towards local and sustainable food.

In addition to strong policy, collaboration between government, local producers, distributors, and institutions will strengthen our local food system, contribute to our economy, and mitigate climate change. It is time for Manitoba's institutions to put Manitoba on the menu.

Introduction

Institutions such as hospitals, long-term healthcare facilities, Crown corporations, universities and schools have a critical role to play in food system change. Their large purchasing power and role as public facilities put institutions in a unique position to be positive drivers for growing our local and sustainable food economy. However, most institutions rely on a food system built on inexpensive foods produced within a global system of agricultural trade. Institutional food buyers have a complex task balancing the cost of food ingredients and labour, managing operational costs, and managing time and available resources. Consequently, most food service contracts are negotiated within bidding processes that reward the cheapest price without consideration of where a product is produced.

Manitoba is home to a diverse agricultural sector, producing and processing foods such as grains, dairy, eggs, fresh produce and meat. However, most of our agricultural sector produces food for the export market. Manitoba producers have excelled at efficiently reaching global markets. Yet local, sustainable production can play an important role within our local economy. It can provide farmers with new revenue sources and new markets for their products, create local processing jobs, enable new farmers to enter the sector in a less capital-intensive way, and address threats such as border closures that have been experienced in recent years. Additionally, there is increased demand from consumers for market transparency and connection with producers, and in a time of broader shifts within the agricultural sector to meet the needs of the 21st century.

In addition to supporting the economy, supporting local and organic food production is an important strategy towards reducing Manitoba's greenhouse gas emissions. In 2015, the Province of Manitoba committed to supporting local food production and procurement as an important strategy in Manitoba's Climate Change and Green Economy Action plan. A commitment has been made to promote sustainable farming systems, nurture organic farming, increase support of local food production and support local food through government procurement. In addition to strong policy, there are several key factors that need to be addressed within institutional food procurement in order to successfully meet this goal.

Institutional food procurement presents a "chicken or egg" scenario for the local food economy. Without a strong supply chain to source a diverse array of local producers and processors, institutional food purchasing decisions that are based on cost and convenience largely exclude local and sustainable food procurement. Conversely, increased institutional purchasing of local, sustainable food would create the market necessary to develop the strong supply chain. There is little incentive to develop this market when most Manitoban institutions do not prioritize local, sustainable food procurement. In the meanwhile, those institutions with dedication to local and sustainable procurement face challenges, such as having to spend more time and resources ordering food directly from local businesses.

The institutions that participated in this project identified numerous barriers that limit the amount of local and sustainable food that they currently procure. These included issues such as price, the availability of particular products (including the seasonality of some local products), and time required to order and prepare local products, as well as contracts that require purchasers to buy particular (non-local) products. Some institutions have also demonstrated that these barriers can be overcome and provide numerous

benefits to the institution. Case studies of Diversity Food Services, Sisler High School, and Manitoba Liquor & Lotteries have been included in this report to highlight the ways that Manitoban institutions are currently putting Manitoba on the menu.

In 2013, Food Matters Manitoba completed a survey of local producers to identify interest in selling to institutional markets. Nearly 90% of producers surveyed indicated that they were interested in selling to institutions. However, only a quarter were doing so already and most indicated that they were not market ready to sell to institutions. Throughout this project we continued to find that producers and processors are interested in the market but have not been able to access it for a variety of reasons from requirements for particular food safety certifications to price point to simply not knowing which institutions are interested in purchasing local products.

This report examines the results from eight participating institutions, highlighting the current challenges and opportunities towards local food procurement, lessons learned from institutional leaders in Manitoba, perspectives from local producers and processors, as well as recommendations on how local, sustainable procurement can be increased.

Canadian Context

In recent years, local and sustainable food has become a growing trend with consumers across Canada. Restaurants Canada's 2014 Chef Survey identified locally sourced foods as one of the hottest trends in the restaurant industry. This mirrors findings from the United States where locally sourced meat, seafood and produce, and environmental sustainability were identified as the top trends in the National Restaurant Association's "What's Hot" Culinary forecast for 2015. Another recent study done by the Business Development Bank of Canada identified the buy-local movement as one of the five trends shaping the retail market in Canada.

In response to this growing demand, some institutions have begun to change the way in which they procure food, including producing their own food, establishing direct relationships with local producers and/or processors, or including requirements for local food in their food service contracts. These changes have often been led by visionary champions, and in some cases have been supported by public policies or programs, particularly in schools and post-secondary institutions located in Ontario, Quebec and British Columbia.

Ryerson University

After re-writing its Request for Proposal (RFP) in 2013, Ryerson University has been rebuilding the culture of food on campus by focusing on healthy, sustainable and local food, as well as scratch cooking.

Currently in a contract with Sodexo (Chartwells), they have set a number of goals, including 25 percent local and sustainable procurement targets, with a two percent increase throughout the contract. Since 2013, they have brought on 29 new, mainly local suppliers.

They also have an awareness campaign to inform students and staff about Ontario foods and about the local producers who supply food on campus.

St. Joseph's Health System Group Purchasing Organization

In 2012, St. Joseph's Health System Group Purchasing Organization in Ontario became one of the first Group Purchasing Organizations (GPO) in healthcare to make local and sustainable food a priority. This included incorporating local food language in their RFP and requesting food origin information from their suppliers. Over a two year period, St. Joseph's Health System Group Purchasing Organization increased their purchasing of local food by 15%, resulting in an investment of \$1.3 million in Ontario foods (The Canadian Coalition for Green Healthcare, 2012).

Local and sustainable food procurement has become a way for institutions to differentiate themselves from their competitors and demonstrate their commitment to their local community. It has become an important selling feature for customers and has been linked to increased food sales, local economic development and creating a sense of pride and trust within institutions. For example, results from interviews conducted with students at the University of Victoria suggested that university mandates that emphasized local food and sustainability were important in student satisfaction levels and trust in the University's governing bodies. University of Victoria students expressed a sense of pride regarding their local food successes (VICRA, 2011).

Provincial governments across Canada are also taking steps towards supporting local food procurement. In 2013 Ontario passed *Bill 36: The Local Food Act*, which includes improvement for food literacy and improved access to, and use of, local food. The Government of Ontario has also introduced a Local Food Procurement Policy that requires ministries and agencies to consider purchasing local food for purchases over \$25,000. In 2015, *Bill M 222: The Local Food Act* passed its first reading in British Columbia, calling for the need to provide a stable demand for local food through public sector purchasing.

Manitoba Context

Manitoba is home to a rich, vibrant agricultural setting where grain, meat, dairy and produce is grown and raised. However, much of Manitoba's agriculture has been, and remains, focused on export markets. Manitoba crops and meats are marketed around the world. A side effect of this focus is that there are a number of challenges that impact the local, sustainable food economy and the local market for Manitoban food producers and processors remains underdeveloped.

Similar to other parts of Canada, Manitoba is experiencing a growing interest in local food. This includes a growing number of local food initiatives across the province including farmers markets, urban gardens, local food buying clubs, a local food campaign (Buy Manitoba) and an increasing number of local businesses establishing themselves in the retail and restaurant market.

The restaurant market in Manitoba has mirrored national trends, with many new restaurants opening in Winnipeg and elsewhere in the province that focus on local, fresh, and sustainable ingredients. Winnipeg is increasingly recognized for its vibrant and diverse food scene. As such, chefs are seeking out local and/or sustainable products for use in their restaurants. This has provided a valuable market for Manitoba's producers and processors and has increased the visibility of the province as a culinary destination.

Most of Manitoba's public institutions have lagged behind the private sector's adoption of local foods. Two examples of institutions that have done significant local and or sustainable purchasing have been the University of Winnipeg and Manitoba Liquor & Lotteries. Diversity Food Services at the University of Winnipeg has been recognized nationally as a leader in local and sustainable food procurement, purchasing over 60 percent of their food purchases on local and/or local, sustainable food. Manitoba Liquor & Lotteries, a Crown corporation, has made a commitment to procure 25 percent local food. They current purchase approximately 20 percent on local food.

In 2015, a Manitoba government-mandated working group called Small Scale Food Manitoba issued a report highlighting more than 20 recommendations to create a more supportive regulatory and political environment for small, local food producers. Since then, the province appointed two staff positions to specifically support local food initiatives, and have committed to supporting local and organic food in Manitoba's Climate Change and Green Economy Action Plan. This action plan includes the following:

- Under the *Farm and Food Awareness Act*, Manitoba will commit to a target of 20 per cent of government food procurement that is be produced in Manitoba and purchased from Manitoba farmers and processors,
- Manitoba will support local food through government procurement,
- Manitoba will continue to promote organic farming systems to reduce energy use and GHG emissions,
- Manitoba will increase support of local food production with particular emphasis on indigenous communities and encourage small-scale farming, and
- Manitoba will work with post-secondary institutions to support the integration of sustainability in their daily operations.

Support from the provincial government is important for establishing procurement standards that require local foods to be purchased. In addition to strong policy, there needs to be buy-in from institutional staff in order to meet targets for purchasing local food.

Manitoba on the Menu

Manitoba on the Menu (MOTM) was a two-year pilot project that explored procurement practices within institutions along with the barriers and opportunities that exist to increasing local, sustainable food purchases.

Voluntary participation was sought from government and non-government institutions to track current food purchases. The project coordinator connected with over 25 institutions to share information about the project, share resources, or discuss options for local procurement in their context. Of these, baseline data was collected from a subset of eight institutions of various sizes, including a healthcare facility, educational facilities (secondary and post-secondary facilities) and a Crown corporation. Food items were measured and tracked to identify the percentage of current local and/or sustainable purchases and identify opportunities to substitute local products for existing purchases.

After completing the baseline data scan, it was identified that there was a gap in the understanding of procurement practices at institutions in rural Manitoba. Interviews were conducted with 29 rural institutions across Manitoba to understand the relationships that exist between local processors and institutional food

buyers. Farmers and processors (with a focus on abattoirs) were also contacted to understand opportunities and barriers for institutional marketing from their perspective.

Throughout the project, interaction with multiple stakeholders including kitchen staff and administration at participating institutions, farmers and processors, and distributors, revealed the barriers and opportunities for local food procurement in Manitoba.

Finally, to increase the capacity of Manitoba institutions to purchase local, sustainable foods, events and resources were created. Two events called Get Fresh were held which brought together local producers looking to sell to institutional markets and food procurers from local restaurants and institutions. This created new market opportunities for Manitoba producers and processors. Case studies were created of Diversity Food Services and Manitoba Liquor & Lotteries to highlight two diverse made-in-Manitoba local procurement stories and address the key barriers and concerns identified by other institutions.

Defining Local and Sustainable Food

Defining terms like “local” and “sustainable” is often challenging. At the same time, clarity is essential in procurement to encompass the aspects and concepts of food production, as well as sharing a common definition for those using it.

This project adopted the Buy Manitoba definition of local food. Buy Manitoba is a joint public awareness campaign between the Province of Manitoba and the Manitoba Food Processors Association (MFPA). Under this program, local food is defined as the following:

Manitoba Food – Any food or beverage made entirely from ingredients sourced in Manitoba or composed of more than 85% of main ingredients from Manitoba. All of the processing and packaging activities must be done in Manitoba.

Manitoba Made Food – Any food product or beverage processed and packaged entirely in Manitoba. When the main ingredients are available in Manitoba in sufficient quantities they must be used.

It is harder to determine what qualifies a food product as “sustainable” given the many ways that this term is defined. For the purposes of clarity and replicability, it was determined that third party certification was required for confirming sustainability. While the program was open to multiple certification systems for sustainability, the one that was used by Manitoba producers during this project was organic certification. Sustainable food was defined as:

Certified Organic (CFIA or USDA Certified) – A food product must be 95% or more certified organic, meaning free of synthetic additives like pesticides, chemical fertilizers, and dyes, and must not be processed using industrial solvents.

When the project began, a certification called “Local Food Plus” (LFP) was also used as a measure of sustainability. However, during the project the certification entered a transitional period and is currently being reassessed and there are no longer LFP-certified farms in Manitoba.

Institutional Food Procurement

Little is known about the size of Manitoba's institutional procurement market. Institutions are diverse and their public reporting reports food budgets in different ways (some include the cost of raw ingredients, some include labour or other facility costs). There had been no previous analysis of the purchase of local and/or sustainable foods by Manitoban institutions. Therefore, it was essential to better understand the size of the institutional market and the nature of local and/or sustainable food sales within that market.

Institutions from across Manitoba and various sectors were contacted, including long-term care facilities, Crown corporations, government institutions, universities and schools. Because participation was voluntary, participants were made up of food buyers or administration with an interest in participating in this project. Food purchases were analyzed from the following participating institutions:

- Canadian Mennonite University
- École Leila Community North School
- Manitoba Liquor & Lotteries
- Maples Personal Care Home
- Saint John's Ravenscourt
- Sisler High School
- University of Winnipeg
- University of Manitoba
 - Aramark
 - Degrees/The Hub
 - St. Andrews College
 - St. Johns College
 - St. Paul's College

Data was collected from institutions of different scales to better understand the challenges and opportunities that exist. While the results varied widely, it is clear that most institutions had low percentages of local food purchasing, and very low percentages of local and sustainable food purchasing.

Rural institutions were also contacted as they were under represented in the purchase audits. An interview was completed with each institution to better understand their food procurement and the opportunities and challenges for local and/or sustainable procurement in a rural context.

Methods for Analyzing Food Purchases

The following steps were used to analyze food purchases made by participating institutions:

- To complete the purchasing audit, institutions provided purchasing information including invoices from their distributor(s) or producers and, in some cases, receipts from grocery stores.
- The MOTM coordinator manually analyzed invoices to determine the amount of money spent on local and sustainable food.
- Data was collected for time periods ranging from two to eleven months, although a minimum of six months of data was preferred. In situations where this was not possible, institutions were asked to include data from months that were most reflective of their operations.
- Purchasing information provided on invoices often did not include information about product origin so distributors and suppliers were contacted in order to better understand what listed items qualified as local. The level of information provided by suppliers varied, and in some cases it was not known where a product was produced, processed or packaged. Local distributors such as Fresh Option Organic Delivery and World Wise Distributors had a strong focus on promoting local and/or sustainable products, and food items were more easily identified as Manitoban, and if the product met the project's definition of sustainability.
- All food items that were purchased were categorized into food categories (such as dairy, bread, meat), and identified as local, sustainable, both or neither (Appendix B, Table 1).
- The percentage of local and sustainable food purchased within each food category as well as within the overall food budget were determined at each institution.

Results from Purchasing Audits

The type and amount of purchasing information varied by institution.¹ In total, \$1,370,061.80 of food purchases was analyzed, representing an estimated annual purchase of \$5.2 million dollars. Of this, 10 percent was spent on local food overall, while less than one percent was spent on local and organic food or imported organic food (Table 1).

10 percent was spent on local food overall. Less than one percent was spent on local and organic food.

¹Although Canadian Mennonite University, St. Johns College (University of Manitoba) and Aramark (University of Manitoba) participated in the project, the data provided was not comprehensive. For instance, prices per item were not included, or limited information was provided from a few suppliers. The data provided facilitated discussions regarding possible increases in local procurement, but has not been incorporated into the comparative analysis.

Table 1: Total Dollar Amount on Food at Participating Institutions

	Total Dollars Spent	Percentage of Dollars Spent
Total	\$1,370,061.80	
Local	\$137,878.71	10.1%
Local and Organic Certified	\$6,652.22	0.5%
Organic Certified	\$1,933.46	0.1%

Table 1 illustrates the participating institutions, the purchasing time period and estimated total dollar amount spent over a 12 month period based on the information received. Based on the size of the food operation, participating institutions spent approximately between \$3,000 and \$4 million dollars on food purchases in a year.

Table 2: Total Dollar Amount Spent on Food by Participating Institutions

Participating Institution	Purchasing Measured	Food Purchases Tracked	Estimated Total Annual Food Expenditure
Institution 1	2 months	\$620,015.16	\$4,000,000
Institution 2	11 months	\$376,769.50	\$400,000
Institution 3	2 months	\$57,406.02	\$300,000
Institution 4	6 months	\$159,233.27	\$300,000
Institution 5	6 months	\$145,015.32	\$200,000
Institution 6	6 months	\$2,434.96	\$5,000
Institution 7	7 months	\$2,048.99	\$3,500

This analysis provides a much clearer understanding of the current extent of local, sustainable procurement. A few institutions had high proportions of local and sustainable purchasing, but most participating institutions purchased between two and 20 percent (Figure 1). Most institutions had low levels of local purchasing, and very low levels of local and sustainable purchasing. Table 1 in Appendix C represents the total percentage of local, and local and sustainable food purchases made by each institution.

A post-secondary institution and a Home Economics program had the highest percentages of local and sustainable food purchases. These institutions more commonly purchased food from a variety of local businesses and distributors, had direct relationships with producers and had a strong mandate to purchase local and sustainable foods at their institution. Because the food buyers had established direct relationships with producers, they would often ask questions about production methods and practices or had visited the farming operations themselves. In these cases there was an established level of trust around production practices. Therefore, not all producers that they bought food from had organic certification even though they likely followed similar practices.

Institutions that had the lowest percentages of local food had purchased a majority of their food from Sysco, but did not have any formal commitments in place to purchase local or sustainable food during the

time of the project. Although there was some interest in local food procurement, with the exception of two institutions, participating institutions did not increase their local purchases during the length of this project.

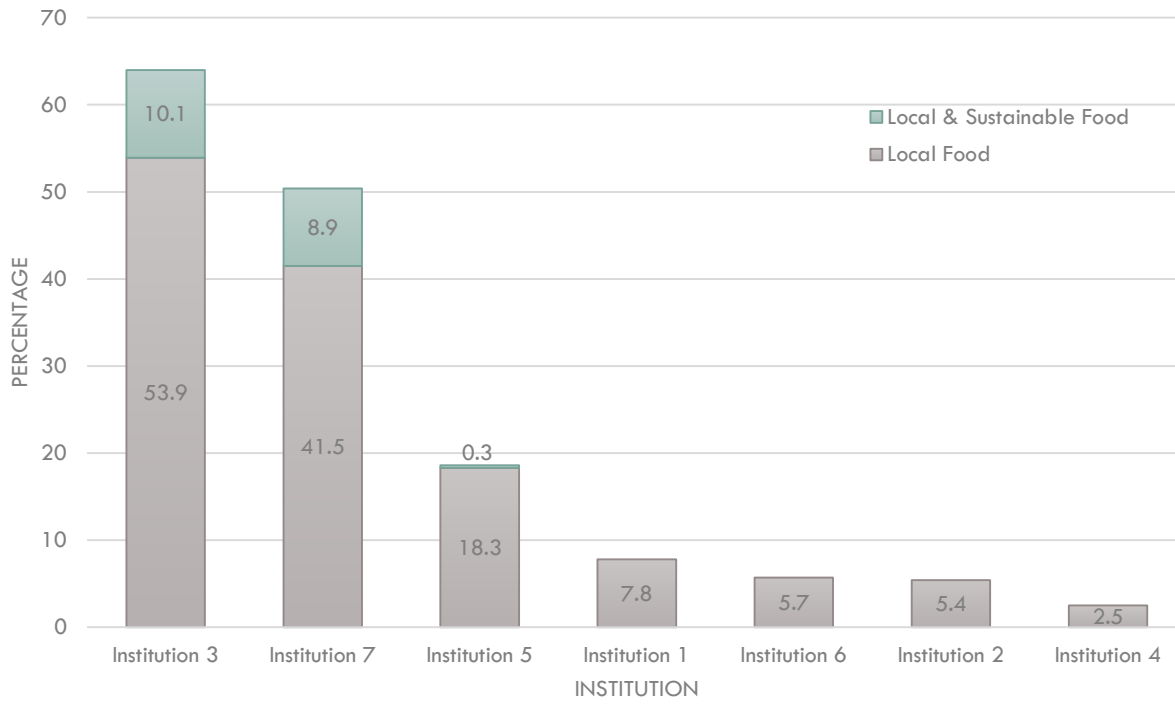


Figure 1: Local and Sustainable Food Purchased by Participating Institutions

Purchase Audit Process Challenges

As this was the first time this type of purchase analysis was done in Manitoba there were a number of challenges experienced throughout the process.

- It was often difficult to determine product place of origin and production characteristics based on invoices or receipts. This is not something that distributors include in reporting in most cases. For example, it often was not clear if a food item was produced and/or processed in Manitoba. In many cases it was difficult to obtain this information from suppliers or manufacturers, particularly when the companies has multiple processing facilities, some of which are in Manitoba.
- Local products are often distributed under brands that are labelled with a generic name by a supplier/distributor. For example, in some cases root vegetables were labelled under “Sys Imp” but were Peak of the Market vegetables. Sysco provided “Local Hot Sheets” meant to help food buyers identify local brands. This information was not provided on invoices, making it difficult to track after the fact.
- Determining the quantity of items purchased was difficult. For example, a unit of measurement (for example: case) for an item was provided, but it wasn’t always clear how many food items were in

a unit of measurement. It was difficult to obtain this information from distributors. This information is particularly useful for determining what would be required to meet existing institutional demand.

- Not all institutions were willing to share data tied with purchase value. In these cases quantities were included but not the dollar value of purchases, making it difficult to compare with other institutions.
- As this was a voluntary program, participating in the purchase audit was a low priority for staff at several institutions. Additionally, staff turnover made obtaining purchasing information difficult, as a few institutions experienced turnover during this project. For instance, one initial staff member was highly interested in the project but their successor was not. Without a broader institutional mandate, there was no guarantee or obligation to purchase local and sustainable food.
- The purchase audit required that definitions be developed for “local” and “sustainable” food. Some participants were critical of the way that local or sustainable was defined for the purposes of the project, with some seeking broader definitions and some seeking a more restrictive definition.

Where and How Food was purchased

The number of suppliers that a food buyer worked with varied by institution. Both large and small publicly funded institutions had contracts with multinational suppliers and food service management companies. Participating institutions of smaller scale, such as food vendors within schools and home economic programs shop more commonly at grocery stores, although a few also purchase food from distributors. Diversity Food Services at the University of Winnipeg works with the largest number of food suppliers and locally owned businesses. Diversity Food Services work with up to 130 different suppliers for general goods and services. Approximately 70 of these suppliers are independent food producers that they work with directly.

The most common distributor that institutions purchase food from is Sysco. Other distributors include Northern Meat Service, Pratt's, Independent Fish, Mariner Neptune, World Wise Distributors, Fresh Option Organic Delivery (F.O.O.D) and Garden Grove Distributors. Figure 1 illustrates the market share of the most commonly used distributors from participating institutions. Although Manitoba Liquor & Lotteries worked with different suppliers under their previous food service contract, this graph only reflects purchases made under their current supplier, Sysco. Overall, Sysco had 87 percent of the total market share for food purchases analyzed by participating institutions, Pratt's had four percent, and Northern Meat Service had two percent, while other distributors had six percent of the total market share for food purchases. This points to the necessity of involving major distributors like Sysco in institutional local food procurement, but also the need to better recognize why many local producers are absent within these major suppliers.

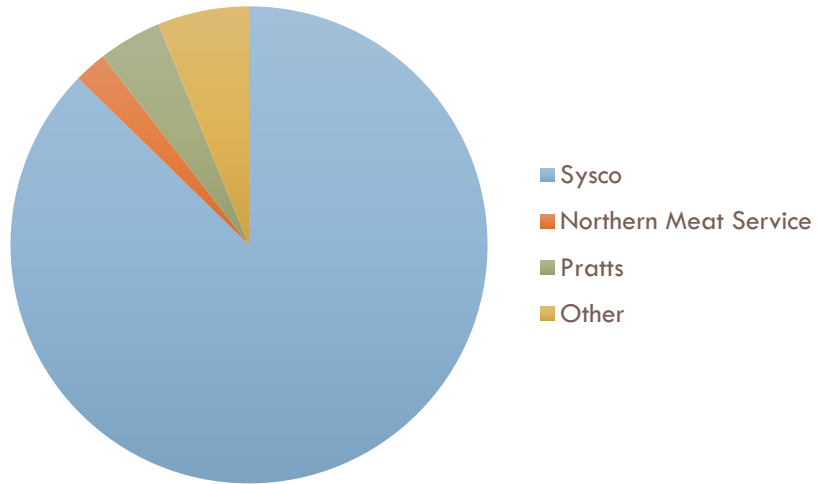


Figure 2: The Percentage of Money Spent, by Distributor

Although all participating institutions had purchased food from either a major distributor or grocery chain, many had also supplemented these purchases by buying food from local businesses. This included DeLucas, Cocoabeans Bakeshop, Nature’s Farm, City Bread and Gunn’s Bakery. Figure 3 highlights the market share of the most common local businesses that participating institutions had purchased food from. Some small institutions even purchased food from grocery stores. Table 2 in Appendix C provides detailed information on where food was purchased from.

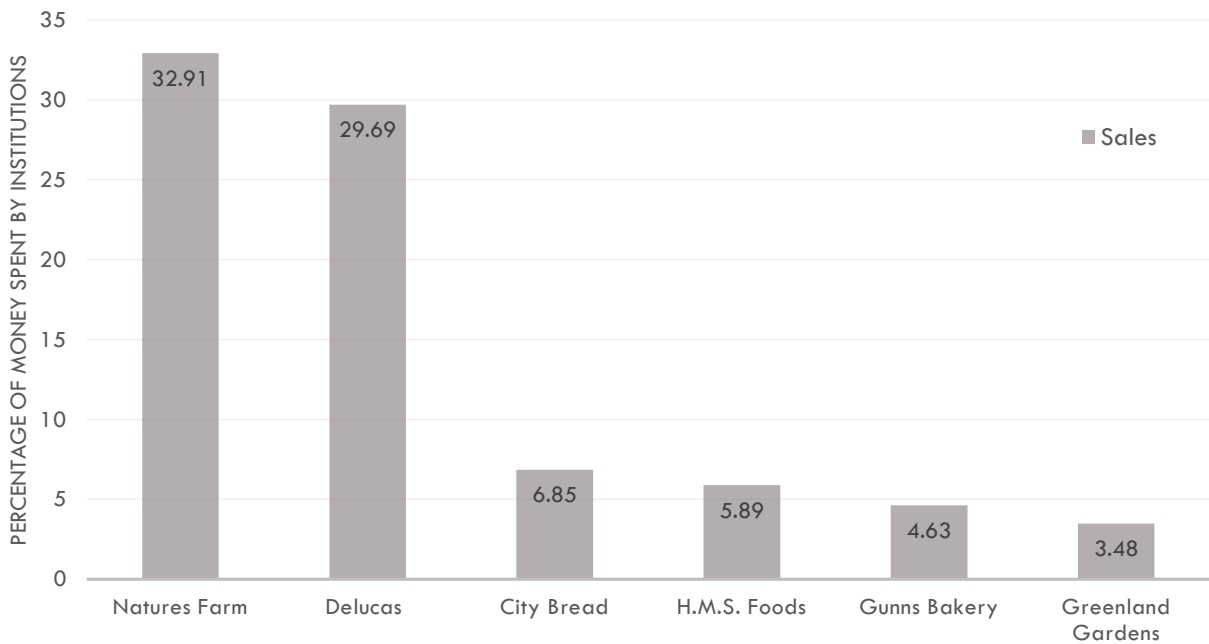


Figure 3: Percentage of the total spent by institutions from Manitoba companies

The Local Brands Most Commonly Purchased

The most commonly purchased local brands overall were Granny's Poultry Co-operative, Nature's Farm, Bothwell Cheese, City Bread and Loveday Mushrooms. A majority of the local brands purchased are products already well-established in the retail/wholesale market. Although some local brands do offer organic certified products, it was not common to see local, organic food items purchased by most institutions.

Since the Buy Manitoba definition was used to determine which products were local, foods that were produced or processed in Manitoba were included. This meant that a broad range of processed products were considered local, including some that did not include ingredients from Manitoba. With the exception of a few institutions, many locally owned businesses including smaller-scale and specialty producers remain largely underrepresented from institutional purchasing. For example, local producers that have a strong focus on organic farming practices supply to very few institutions.

In the case of most other institutions, especially those in a food service contract with large distributors, the local foods that were purchased were more commonly national or international brands that have some production or processing capacity within the province. This was unsurprising as many large distributors have strong relationships with large food companies and often require food vendors to have specific requirements in regards to volumes, food safety and liability insurance. The brands that institutions choose or are allowed to buy is an indication of a gap that currently exists between smaller-scale specialty producers and larger scale agribusiness within the supply chain.

Barriers to Purchasing Local and Sustainable Food

This project has demonstrated that there are numerous barriers that limit institutions' interest and ability in increasing their purchasing of local and/or sustainable foods. Of the institutions that completed purchase audits, a Crown corporation and food program within a school demonstrated measured increases in their local food purchases. For the most part, institutions did not shift their purchasing practices during the period of this project. Resources were also shared with numerous other institutions but there is no data to determine if their procurement practices changed.

After the purchase audit was completed at each participating institution, follow up discussions were held to go through the audit results and identify areas for potential increased local procurement. These discussions along with meetings with other institutions and stakeholders identified a number of challenges that limited interest and ability to procure local and/or sustainable food. These challenges are illustrated in Figure 4.



Figure 4: Barriers to Local and Sustainable Food Procurement by Institutions

Time

Many institutions indicated that they felt they did not have the time or the ability to change specific aspects of their food procurement system. For example, ordering food from more than one supplier, looking into details about a local producer, shopping at different stores, or changing menus would require too much staff time. Relationships are acknowledged as a key component to successful local procurement from smaller providers, but these relationships also take time to develop.

Price

Nearly all institutional food buyers mentioned that price is one of the most significant barriers in buying local and sustainable food, and particularly for certified sustainable food products. This was true for institutions within food service contracts as well as smaller food programs within schools. Most if not all publicly funded institutions are required to stay within an annual budget and some participants mentioned that they were obligated to make a specific profit from each meal when selling food for purchase. Participants were concerned that local foods, and local, sustainable foods in particular, would not be affordable within their budget.

Labour

In many cases, the amount and type of labour an institution has is tied to the type of food procured. Many institutions have a small staff that work with pre-packaged food rather than cook with ingredients from scratch. This was identified as a barrier to procuring local and/or sustainable whole food ingredients as there are fewer processed foods available that are local. Increased purchasing of some local food products would require a shift in the staffing model of food service providers.

Quantity and Consistency

Working with suppliers who could consistently meet the demand of the institution in terms of volume was a significant consideration, particularly for larger-scale institutions. Time was a major factor as most food buyers felt that they did not have the time to work with a number of smaller-scale local and organic producers in place of a small number of large-scale food suppliers who can ensure consistency and quantity through their diversified supply chain. This can be addressed by purchasing local items available through distributors in large quantities.

Resources & Equipment

Kitchen equipment was another important investment for institutions. Kitchens have been built to prepare processed foods rather than cook from scratch. This included freezer space to be able to freeze and store seasonal food items for later use. One participating institution noted that a lack of freezer space was one major reason for not purchasing local produce.

Seasonality of Food Products

Although there are many foods available from Manitoba year-round, such as meat, dairy and grains, many institutional food buyers indicated the seasonality of Manitoba grown foods as a reason why they found it challenging to purchase local and/or sustainable foods, particularly local produce. Most institutions have standard menus that do not shift for the seasonality of Manitoba crops.

Food Service Contracts

Some institutions have contracts with a distributor (i.e. Sysco) or a food service management company (i.e. Aramark). Two participating institutions had existing contracts with Aramark. Both institutions were in a profit/loss contract, meaning that the food services management company bears the risk of loss and opportunity for financial gain (FINE, 2015).

It was found that contracts impose stricter requirements for purchasing food on these participating institutions. For instance, food buyers were obligated to conform to compliance reports. These reports guide purchasing decisions by recommending specific brands to institutions. In most cases, these are not local brands. A compliance report will tell a buyer what percentage of their purchases are “approved” products. For example, 97% compliance means that 97 percent of purchases were from approved vendors. Compliancy reports have been used as one way to promote specific brands in order to protect the lower cost of food items offered in bulk by a distributor and to ensure quality. However, they have the side effect of limiting market access for smaller-scale, specialty brands from Manitoba.

Relationships

Relationships were a key aspect of a food buyer’s decision in choosing where and whom to purchase food from. Some participants indicated that they had a positive relationship with a representative from a major distributor, while others had established connections directly with a farmer. Time restraints made it difficult for food buyers to invest the time into buying from different suppliers.

Examples of Successful Local, Sustainable Food Procurement in Manitoba

Diversity Food Services at the University of Winnipeg and a Home Economics program at Sisler High School stand out as leaders for local and sustainable food procurement. Manitoba Liquor & Lotteries is an emerging leader. Together these institutions represent different scales of institutional purchasing models: a small home economics classroom, a mid-sized post-secondary institution and a large Crown corporation. These institutions had common characteristics that were unique from other institutions, including the following:

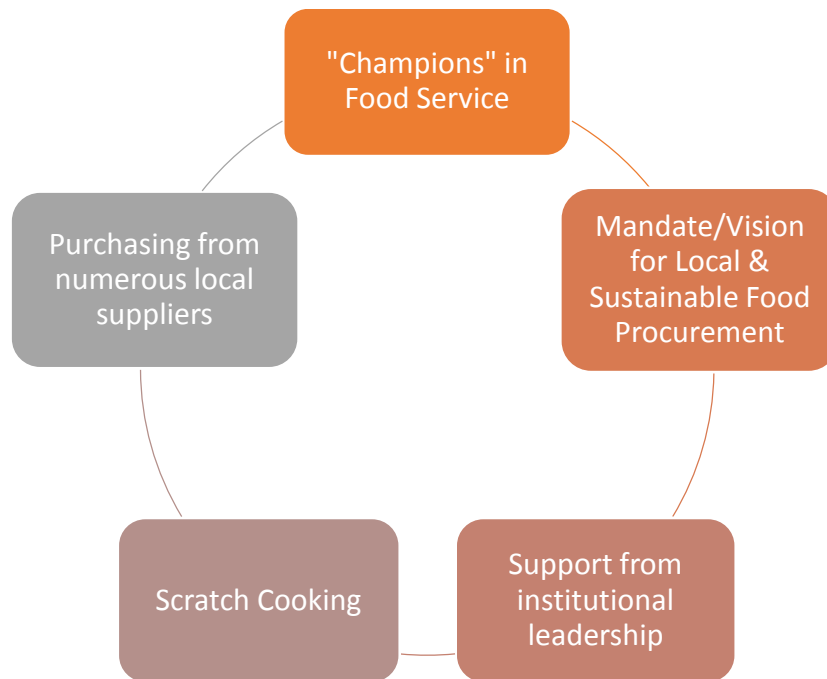


Figure 5: Commonalities between Leading Institutions for Local & Sustainable Food Procurement in Manitoba

“Champions” or leaders within the food service operation

- It is essential to have “champion(s)” within the food service operation, meaning someone working within the food system with passion and dedication for purchasing local and sustainable food.
- A champion is essential for pioneering these initiatives, but for their long-term success the champion(s) need to work to ensure that there is buy-in throughout the organization.

A mandate or vision within their food service and food programming for supporting local foods and sustainability

- Purchasing local and sustainable food is a first priority at these institutions. This includes purchasing organic certified foods, supporting fair-trade practices, or Marine Stewardship Council fish. This is embedded throughout the organization.
- Manitoba Liquor and Lotteries set clear goals to purchase local foods within their food service contracts. This was included in their corporate social responsibility for sustainability. Sisler High

School and Diversity Food Services do not have formal targets, but prioritizes local, sustainable foods and aims to purchase them whenever possible.

Support from institutional leadership

- All institutions indicated that a supportive administration enabled them to place a strong focus on local foods and sustainability. Administrative support is necessary given the budget or other resource allocations that are required for a successful initiative.
- Administrations can also develop policies related to local procurement to ensure that it continues even if there are staffing transitions. As there is a high level of turnover in the food service sector this is an important step for ensuring continuity.

A strong focus on cooking food from scratch

- Whether teaching students how to prepare foods from scratch or preserve local foods or having a strong employment development strategy that included hand-on learning for scratch cooking, scratch cooking was an important method to incorporate whole, local ingredients into menus.
- This is particularly true in Manitoba given that there are few options for purchasing processed Manitoba food products such as pre-cut vegetables.

Purchasing from a diversity of suppliers and having the flexibility to do so

- Purchasing from a diversity of businesses, including local distributors and local producers allowed institutional leaders in this province to procure over 50 percent of their total food purchases on local and sustainable food.

Case Study #1: Diversity Food Services

Diversity Food Services is a food service operator located at the University of Winnipeg. They are currently purchasing over 60 percent of their total food purchases from local or local, sustainable producers. Purchasing food directly from approximately 70 different local producers, Diversity Food Services is the leading food service within Manitoba for local, sustainable food procurement.

In 2009, Diversity Food Services was created when the University of Winnipeg's Community Renewal Corporation (UWCRC) partnered with SEED Winnipeg to create a social enterprise that aims to provide food in a socially responsible manner for the well-being of their customers, community and the environment. This vision for a new food service operation was supported and led by higher administration, including the president of the University of Winnipeg. Operating in a mid-sized post-secondary institution, Diversity Food Services represents a unique food service model for the following reasons:

- Seasonal, local and organic whole ingredients are chosen as a first choice when purchasing food.
- Nearly all meals are made from scratch (including sauces, dressings and stocks).
- They are a social enterprise, investing in labour and providing quality jobs for people who face barriers to employment.
- They invest more money in labour costs and less on the cost of processed ingredients.
- They work with up to 130 vendors, including 70 local businesses for food. They have established relationships directly with many local producers.

- Menus are adaptable and change multiple times per year to accommodate the seasonality and market fluctuations of local food.
- There is strong support from within the administration to purchase local and sustainable food.
- They have invested in awareness and education campaigns to illustrate the choices they make within their community.

Although this food service operates differently than most other institutions, it illustrates that it is possible for an institution within Manitoba to purchase high levels of local and sustainable food. They do so while remaining committed to offering high quality, healthy meals at an affordable price while providing meaningful employment opportunities for people who face barriers to employment.

Case Study #2: Sisler High School

Over the past five years, a home economics program at Sisler High School has been making strides towards purchasing local and sustainable food from Manitoba. Purchasing from a local distributor (Fresh Option Organic Delivery) for local, fair trade and organic food items, purchasing directly from local producers and utilizing food from the school's garden, this program purchases over 50 percent of their total purchases on local and sustainable food. Operating a small program within a high school, this program is unique for the following reasons:

- Local and sustainable food is a priority and purchased as a first choice.
- Seasonal, local food is purchased in bulk and preserved for later use (i.e. freezing, canning). Much of this food is utilized year-round.
- Education and awareness is provided by taking students to farms for field trips, doing “work-bee” experiences on local farms and maintaining the school garden.
- Other aspects of sustainability are entrenched within the curriculum, including reducing waste, composting, cooking from scratch, bulk purchasing and reducing the use of disposal items.
- High quality food is purchased but less food is needed. For instance, purchasing high quality meat and stronger tasting cheese enables the teacher to use smaller quantities.
- Students are actively engaged in not only making food, but pre-season preparation, storage of food items and selling food at fundraiser events.
- An annual fundraising harvest supper is made by students using local, seasonal ingredients.

Typically home economics programs are tightly constricted by budget constraints and commonly purchase food from grocery chains. Sisler High School is unique in that they obtained external funding to begin changing their food purchasing towards local and sustainable food. However, after seeing its success, the



Photo 1: A Diversity Food Services staff member making vegetarian patties from scratch (photo credit: L. Dunne)

school administration has provided long-term support to continue procuring local, sustainable food within their school.

Case Study #3: Manitoba Liquor & Lotteries

Manitoba Liquor & Lotteries is a Crown corporation responsible for the distribution and sale of beverage alcohol and lottery products as well as operating the video lottery terminals in Manitoba. They also operate two casinos in Winnipeg that have dining opportunities: Club Regent Casino and McPhillips Station Casino. Serving approximately 9,000 meals at the casinos every week and spending approximately \$4,000,000 dollars on food annually, this was the largest participating institution in Manitoba on the Menu.

The Food and Beverage Department at Manitoba Liquor & Lotteries has implemented several sustainable development programs, including composting and recycling programs and an “enjoy the taste, prevent the waste” campaign within their food service operations to reduce food waste. They also have programs that support Fair Trade beverages and Marine Stewardship Council (MSC) sustainable fish, as well as campaigns that inform patrons around energy and water usage within the food system.

They established a goal to purchase 25 percent of their total food ingredients on local food

Like other large-scale publicly funded institutions, Manitoba Liquor & Lotteries uses a competitive bid process to find vendor(s) to supply the foods needed to operate the casino restaurants. When this project began in 2013, the institution was working with three broad line distributors. In 2013, Manitoba Liquor & Lotteries issued a Request for Standing Offer (RFSO) for food service supplier(s). They requested a food service supplier(s) that could meet the demand of food, minimize deliveries to the casinos, provide bulk pricing, and ensure all food safety requirements were met.



Photo 2: Signage for “Enjoy the Taste, Prevent the Waste” campaign at a Manitoba Liquor & Lotteries restaurant (Photo Credit: Manitoba Liquor & Lotteries)

The chefs at this institution were also interested in supporting local suppliers and offer their customers local food. To do this, they required technical specifics in the bidding process that required the successful food distributor to source a portion of the goods locally. In order to establish a food service contract with a distributor that could meet their goals, Manitoba Liquor & Lotteries had to first define ‘local’ and ‘sustainable’ food as an institution and chose to adopt the Buy Manitoba definition to define local. Third party certifications used to ensure sustainability or ethical procurement include certified organic products, Food Alliance, Rainforest Alliance, and certified Fair Trade products.

In 2014, the Food and Beverage Department also established a target goal to purchase 25 percent of

their total food ingredients and products (by total dollar spent) on local food. To accomplish this, interested vendors had to provide specific details on how they proposed to include and maximize the number of, and total dollar value of the local/sustainable food ingredients and products offered within the casino restaurants.

The food supplier service contract was awarded to Sysco. Under this contract, 80 percent of the food ingredients and items purchased for the casino restaurants come from Sysco. Along with product SKU, description and quantity, Sysco is also required to provide quarterly reports that provide more detailed information around the local foods purchases. The remaining 20 percent of the ingredients are purchased from other suppliers such as Gunn's Bakery and Independent Fish, including local food items such as bread and fish.

In 2014, the Waterhen Lake Fishery, a fishery in Northern Manitoba, received Marine Stewardship Council (MSC) certification for sustainably harvesting walleye and northern pike. This is the first freshwater fishery in North America to be certified. This third party certification verifies fishermen's activities to protect the ecosystem and ensure that the fishery will remain viable in the future. It also provides local fishermen a fair wage for their product. Manitoba Liquor & Lotteries recently became the first institution and restaurant in Manitoba to serve MSC certified Manitoba Walleye as a way of supporting sustainable fish harvesting. They have also used other programs, such as the Monterey Bay Seafood's selection guide to direct their purchasing decisions around seafood.



Photo 3: A Manitoba Liquor & Lotteries staff member handling MSC certified fish from Manitoba (Photo credit: Manitoba Liquor & Lotteries)

There are numerous national and international trade agreements that may impact local food procurement by public entities.

Manitoba Liquor & Lotteries is bound by international and national trade agreements, such as the Agreement on Internal Trade (AIT). A fundamental principle within these agreements is to ensure governments provide the same treatment to goods and services from other jurisdictions. In other words, governments are not allowed to discriminate in procurement contracts based on the source of goods or services.

However, trade agreements also allow for exceptions from specific provisions, as well as general exceptions for legitimate public interest. In international agreements, the provisions apply to procurement "for governmental purposes" which includes goods or services "not procured with a view to commercial sale or resale, or for the use in the production or supply of goods or services for commercial sale or resale." In the context of the AIT, there is an exception related to the purchase of food for institutions, such as Manitoba Liquor & Lotteries Casino restaurants because they are selling "goods intended for resale to the public".

This makes this Crown Corporation unique from other larger government institutions, such as correctional and healthcare facilities, where patients and inmates do not purchase food. This, in combination with

technical specifications set out in the RFSO provided an opportunity for this institution to set a goal to purchase local food from Manitoba and implement a local food procurement strategy.

In summary, Manitoba Liquor & Lotteries increased their local food purchases in most food categories, particularly dairy, meat, produce and grains (Figure 6). However, it's important to note that because there was a higher level of engagement and transparency from Sysco, it was easier to identify local food items in the tracking process from the quarterly reports provided during the second phase of tracking. In other words, because items were not as easily identifiable as local or non-local under the previous suppliers, it was more difficult to accurately identify all of the local food items previously purchased in our tracking process. Over the course of this project, Manitoba Liquor & Lotteries doubled their local food purchases to 20%.

The following results are based on purchasing information received from contracted food suppliers in February and October 2013, as well as purchasing information received from Sysco in February and October 2014. The largest increase in local purchases made was for meat, dairy, produce and grains. Table 1 in Appendix E illustrates the amount of money spent on local food between October and February of 2013 and 2014.

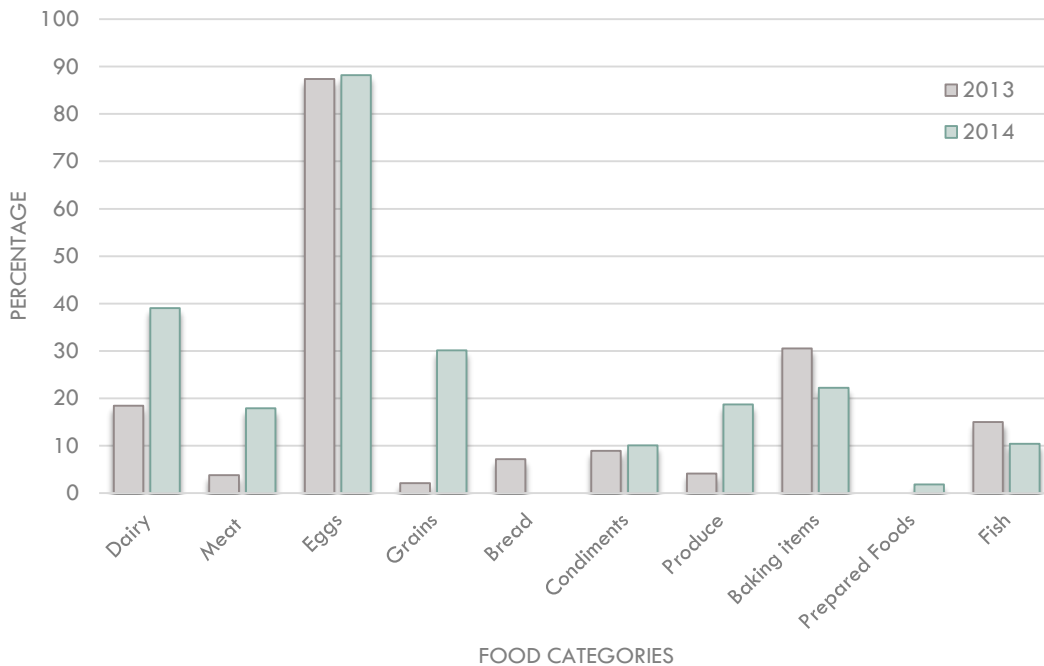


Figure 6: Local Food Purchases made by Manitoba Liquor & Lotteries in October and February of 2013 and 2014

The MOTM coordinator and Manitoba Liquor & Lotteries staff spent time verifying the purchasing information received, as well as inquiring about where food items had been produced or processed. Table

3 below is an example of the material provided on the quarterly food purchasing reports received by Sysco:

Table 3: Example of Purchasing Information Received from Sysco

Item description	Brand	Size	Name	Local	Sales
Cheese Cheddar	Bothwell	2.5 kg	Bothwell Cheese	Local	\$250.00
Pineapple Golden Ripe	Packer	6 ct	Baugh Supply chain	Not local	\$320.00
Flour All Purpose	Prar Fl	20 kg	Prairie Flour Mills	Local	\$2200.00

Below are examples of the local food brands purchased by Manitoba Liquor & Lotteries through Sysco. Notre Dame Creamery Butter, Prairie West Ice Cream and La Cocina Chips were brands that were not previously available from Sysco and were brought on for the institution in order to help them meet their goal of purchasing more local food (Table 4).

Table 4: Local Food Brands Purchased by Manitoba Liquor & Lotteries

Food Category	Local Food Brands
Meat	Danny's Whole Hog Dunn-rite Granny's Maple Leaf Foods (select items) Northern Meat Service
Dairy	Bothwell cheese Notre Dame Creamery Prairie West Ice Cream Saputo dairy (select items)
Produce	Chinese Universal Loveday mushrooms Peak of the Market
Grains	Shoal Lake wild rice
Condiments	Barkman Honey Elmans
Eggs	Countryside Farms
Confectionary	La Cocina
Prepared Foods	Naleway
Baking Items	Bunge Canola Oil

Overall, Manitoba Liquor & Lotteries was able to shape their food service contract to begin to incorporate local food in the following ways:

- They provided a definition of local and sustainable food for a food service supplier
- They have set a goal of having local food make up 25 percent of their total food purchases
- They require quarterly reports from their supplier to identify the type and quantity of local foods being purchased
- A staff member verifies that the foods being identified as local by the supplier meets their definition of local food

Rural Institutions and Provincially Inspected Meat

Although no institutions located outside of Winnipeg participated in a purchase audit, it was important to better understand the purchasing practices of institutions in rural Manitoba, as well as the present opportunities and barriers they face towards local, sustainable food procurement. In addition, it was important to better recognize the relationships that exist between local processing facilities (i.e. provincially inspected abattoirs) and institutions across Manitoba.

Methods

In order to gain an understanding of what and how institutions were purchasing food across Manitoba, a broad range of institutions in rural communities were contacted. This included schools, long-term healthcare facilities, hospitals, day cares and women's shelters. Although we asked a broad range of questions around local food purchases, there was particular interest in knowing how many rural institutions purchased meat from provincially inspected abattoirs. This was for the following reasons:

- Provincial abattoirs were identified as important processors for local producers who distribute their meat within the province. They are especially important for smaller scale meat producers who may not sell within the commodity market.
- Provincially inspected meat is no longer sold at many institutions in Winnipeg, particularly larger, publicly funded institutions. Many institutions have food service contracts that require federally inspected meat or meat with Hazard Analysis and Critical Control Points (HACCP) certification. Additionally, some participants had negative perceptions of provincially inspected meat in terms of food safety.
- There was no information around if or how much provincially inspected meat was purchased by rural institutions, and if the same trends exists in rural institutions.

First, provincially inspected abattoirs were contacted to find out if any had sold meat to institutions. In total, 24 provincial abattoirs were contacted and 21 were interviewed. Some abattoirs indicated that they supply meat to institutions, therefore these institutions were contacted to learn more about their local purchases.

Next, institutions that were geographically located near abattoirs were contacted to better understand if they had purchased meat from meat processors located in their community. Lastly, some institutions that were not geographically located near abattoirs were also contacted. In total, 29 rural institutions were interviewed. Institutions were asked the following questions:

- How large is your institution?
- What type of food service does your institution have (example: cafeteria, breakfast program, meals on wheels)?
- How do you typically purchase food (example: distributor, retail, direct from producers/processors)?
- Do you make food from scratch or do you buy pre-packaged food? Or both?
- Do you prepare food in house or is it made at a centralized facility?

- Are you currently purchasing food that is produced and processed from producers living in your area (example: abattoirs, farmers, local businesses)?
 - If yes, how frequently do you purchase local meat? (once a week, more, less)
 - If yes, how many years have you purchased local meat?
 - If yes, how did you start to purchase meat from your local region?
 - If yes, why do you choose to buy local meat?
 - If yes, are you promoting this in any way to your customers?
 - If no, are you prevented from buying local food in any way?

Results from Rural Institutions and Provincially Inspected Abattoirs

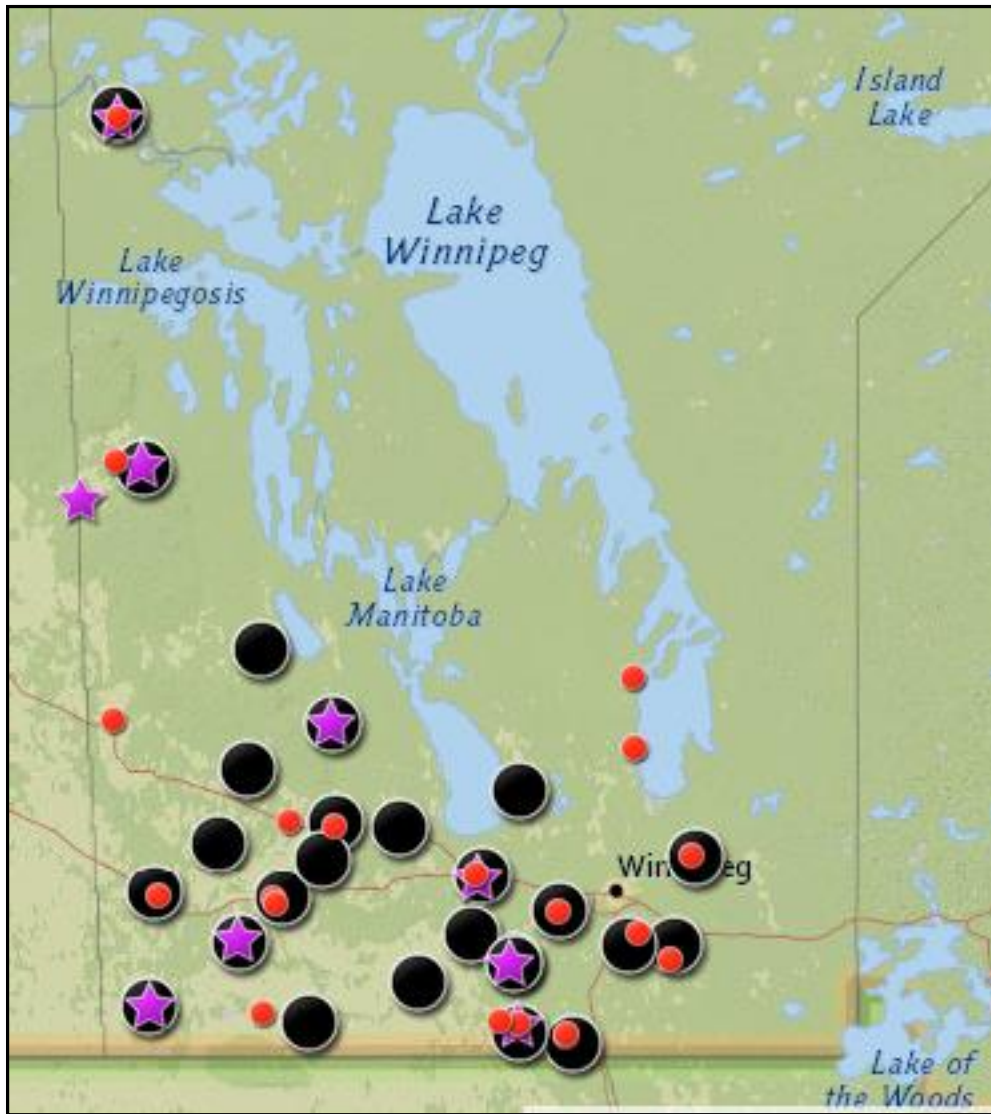
Rural institutions were contacted in order to gain a better understanding of where food buyers were purchasing their food from, whether they were purchasing or growing local food, and whether they were promoting local food in any way. It was also a way to explore the relationship(s), if any, that existed between provincially inspected abattoirs and food buyers in different parts of Manitoba. First, provincially inspected abattoirs were contacted in order to find out if any had sold meat to institutions.

Table 5: The Number of Abattoirs that Currently, Used to or No Longer Sell Meat to Institutions

	Number of Abattoirs	Percentage of Abattoirs (%)
Currently sell to institutions	12	57
Used to sell to institutions	4	19
Never sold to institutions	5	24

In total, 21 provincial abattoirs were interviewed. In summary, 19 percent indicated that they no longer sold meat to institutions (particularly hospitals) because there is a requirement to only purchase federally inspected meat. One participant mentioned that this change occurred five years ago. Some of those that continue to sell institutions now sell to fewer institutions than they once did.

Next, 29 institutions across Manitoba were interviewed in order to explore their local purchases, including buying provincially inspected meat. In total, nine out of 29 institutions (31 percent) indicated that they purchase provincially inspected meat from their local abattoir. This included schools, a college, healthcare facilities, a women's shelter and daycare (Figure 7).



Legend

- Provincially inspected abattoirs
- Institutions interviewed that do not purchase provincially inspected meat
- ★ Institutions interviewed that buy provincially inspected meat

Figure 7: Provincially Inspected Abattoirs and Institutions Interviewed

Freshness, taste, quality and being able to buy smaller quantities were among some of the reasons why food buyers chose to buy provincially inspected meat. However, the most common reason for buying provincially inspected meat was to support the local community and business.

A few schools indicated that they have bought other foods produced from their community, such as dairy and produce (Table 1 in Appendix D). A few schools talked about a school garden or other school programming related to food production. One educational facility had an internal purchasing policy to buy goods from locally owned stores from their community. This school felt that community

Freshness, quality and being able to buy smaller quantities were reasons why food buyers bought provincially inspected meat

sustainability was important, as well as supporting local business and young families with businesses living within the community. Although this was not specific to purchasing locally grown food as buyers were encouraged to purchase from locally owned businesses, such as grocery stores.

However, most food buyers did not indicate that they purchased local food, did not promote local food within their institution, or had little knowledge about local foods that could be purchased from their region. Others described their community as being surrounded by export crops such as wheat, canola and soy with no local options available.

One correctional facility indicated that although their contract allows them to purchase provincially inspected meat they choose not purchase it. Food cost is the most important factor in purchasing food, as the budget for three meals (including tea and coffee) per inmate is \$5 per day. Bulk purchasing is critical as nine correctional facilities collectively order large quantities of food and therefore save on food cost. However, the facility provides innovative programs such as a meat cutting program that provides inmates with experience cutting, processing and packaging meat. There is also a small farm for raising pigs and cows, as well as a vegetable processing program where vegetables are peeled and processed by inmates for their food service.

In some cases, food buyers have little choice in the food that they can purchase, particularly if they are working at healthcare facilities in a Regional Health Authority (RHA). In these cases, healthcare facilities are provided an annual budget as well as an approved list of foods that can be purchased from a current broad line distributor. Of the healthcare facilities that were interviewed 70 percent have an existing contract with Sysco.

A few institutions that are not geographically located near a provincial abattoir were also contacted, but none indicated that they had purchased provincially inspected meat.

Local Producers and Processors

An important aim of this project was to better support local producers from Manitoba, including independently owned producers and processors with a strong focus on sustainable agricultural practices, such as organic. However, it became apparent early on in the project that most participating institutions saw challenges with buying from smaller-scale specialty producers that were not already well-established in the retail market. As mentioned previously, barriers included a lack of relationships, a lack of time to order from multiple suppliers, food safety or liability requirements and restrictive contractual agreements.

One of the issues impacting the decision to buy from local producers and processors was a perception from institutional food buyers that particular food items were less food safe. This included provincially inspected meat. Some chefs and food buyers indicated that they believed meat inspected from provincial abattoirs to be less food safe. However, no participants could explain the differences between provincial and federal food inspection and why it was seen as less safe. Additionally, broad line distributors and food service management companies' typically only purchase federally inspected meat that had HACCP certification. This included Manitoba Liquor & Lotteries, institutions in a contract with Aramark, and many RHA facilities across Manitoba.

To understand concerns with provincially inspected meat, the difference between provincial and federal meat inspection was explored. Table 1 in Appendix F illustrates some of the key differences between provincial and federal meat inspection. Currently, federally inspected facilities in the province exist for poultry and pork. Until a federally inspected facility opens in Manitoba for beef, cattle from Manitoba must be shipped to provinces such as Alberta for federal meat inspection. In other cases, cattle is shipped and sold to the United States. Most institutions predominantly purchase particular brands that meet federal inspection, such as Dunn-Rite, Granny's, and Maple Leaf. It is rare for institutions to purchase from meat producers with provincial inspection.

Aside from a few distributors such as World Wise Distributors, Mariner Neptune and Northern Meat Services, it was also rare that distributors carried a large amount of provincially inspected meat. One distributor indicated that the main reason why they carry federally inspected meat is because it can be shipped and sold inter-provincially. This is important for distributors that ship and sell their products across Canada and North America. Another distributor indicated that because there is a larger demand for federally inspected meat, they carry more federally inspected products. They also indicated that provincially inspected meat comes in smaller amounts because there is less demand, and needs to be moved more quickly.

Large broad line distributors have strict vendor policies and required other certifications from their food producers, including the following:

- Certificate of Insurance (COI)
- Federally Inspected Meat
- Hold Harmless Agreement (a legal policy ensuring that the distributor is not liable in case of a recall or illness)

These safety certifications were very important to some participating institutions, particularly large-scale institutions. However, many small scale producers currently do not meet these food safety requirements, which made it difficult to promote independent local producers and processors with an interest in selling to institutions.

When speaking to food buyers from rural institutions, many also indicated that they did not buy directly from farms because of concerns over food safety. One participant indicated that they wouldn't buy produce from farmers in their region because there would be no accountability if there was an issue with food safety, such as an illness. They felt better knowing that they could buy their produce at a local grocery store instead.

Food safety, as well as knowing that there was accountability in case of a food-borne illness was therefore an important factor in an institution's decision to work with a supplier or producer.

The Perspectives of Local Food Producers

In order to better understand the perspective of local producers, we spoke to and visited a number of Manitoba farmers that were established in the retail market, whether within restaurants, institutions or grocery stores. This included local meat producers, a dairy producer, a produce producer, a grain producer and an egg producer.

Matheson Farms

George Matheson is a hog producer in Manitoba who has worked within the commodity market and sells meat for the direct farm market. George indicated that there used to be five provincial packing plants for pork in the early 1980s and now most do not exist. Today, Matheson Farms mostly sells directly to consumers, but they do continue to do sell some product to Maple Leaf. From his perspective, it has been easier to sell his pork within commodity agriculture but he receives a lower market price. Direct marketing sales are more difficult but garner a higher price. One reason for this is because of the large marketing component with direct sales. As their children grew older and moved away from their farm, the energy required to market and deliver their product to customers has become more challenging. In the past, they have tried to sell to smaller restaurants in Winnipeg but had little success. Although they have never worked with an institutional buyer, they have been part of school fundraisers in Winnipeg and Stonewall. Today, they are more focused on producing a higher quality product for their customers rather than competing for space on store shelves and trying to offer the lowest price.



Photo 1: Pigs in a Bio-tech barn at Matheson Farms (photo credit: L. Dunne)

Spring Creek Farm

Spring Creek Farm is owned and operated by Greg Wood and Lisa Clouston and their children. They also own a meat shop, Cypress Meats, where they process and butcher meat for other specialty local farmers. Spring Creek Farms has supplied meat to restaurants such as Degrees Restaurant at the University of Manitoba and Stella's. When asked what the most important consideration was when working with a customer, Greg mentioned the need for chefs and food buyers to be able to purchase and utilize different cuts of animals. For example, if an institution requested to solely purchase ground beef, it would be more difficult as a smaller processor to supply meat to them. For them, it's important to work with chefs that have the skill to process and cook different parts of an animal.

Adagio Acres (Naked Oats)

Adagio Acres (also known as Naked Oats) is owned by Amy and Donald Nikkel. They first began selling to retail outlets and found that stores were very positive and receptive. Most of their product continues to be sold through retail outlets. Within this past year, they have also begun to sell their product to restaurants and food service establishments. They currently supply oats to various stores and restaurants across Manitoba, including the Pancake House, Fools and Horses Coffee, Green Carrot, Stella's and Red River Co-op. Amy and Donald have found it more difficult to get restaurants and institutions to switch to a new product, likely because it's necessary for them to change their recipes/menus and try something new. When working with grocery stores, Naked Oats has learned that it is the responsibility of the business to continually follow-up, make the product look presentable on the store shelf, ensure that the product is being re-stocked, and make sure that their customers are happy.

Nature's Farm

Hermann is the owner of Nature's Farm, a business that sells eggs, pasta and granola to the retail market in Manitoba, including institutions. Working within the Manitoba food industry for almost 30 years, Hermann believes that is becoming more difficult for local producers to access the institutional food market, especially in terms of regulatory and contractual issues that limit farmers from being a part of distribution networks. Furthermore, larger distributors have increased their market share, further reducing opportunities for local producers.

Although Nature's Farm has the supply to meet institutional demands and does work with several institutions, they are not supplying any large distributors. Large distributors have relationships with egg producers from Manitoba and Saskatchewan and pass on the benefits of that by offering cheaper prices for buyers. Hermann believes institutions continue to buy Nature's Farms products because they like the product, not because it's local. He believes that a younger generation of chefs and people in the food business have been fantastic supporters of local producers, and without them, they would not be here today. However, he described the market for local food in Manitoba as vulnerable and small.

Notre Dame Creamery

Guy Roch has been running Notre Dame Creamery, a processing and packaging facility for local butter since 1980. They also process local, organic milk and organic kefir and are kosher certified. Their products

are federally licensed and CFIA certified. Over the past few years, there has been an increase in butter sales, which Guy attributes to the Buy Manitoba program. They now offer their products at Red River Co-op and have had new customers approach them. They are currently working directly with three distributors, including George Wakefield, Whitecap, and World Wise Distributors. Notre Dame Creamery is also sold to Manitoba Liquor & Lotteries through Sysco.

Currently, they work with two dairy producers that are organic certified, however, from Guy's perspective, the demand for organic products has not increased in recent years. There currently isn't enough skim milk cream available from organic products to make organic certified, local butter at their facilities. Guy mentioned that some retail stores require more certification, which can be more costly for producers and doesn't necessarily mean an increase in sales. New certifications could mean getting building approval, updating safety manuals, and hiring an independent inspector, all of which could cost a business thousands of dollars. Larger retail companies, such as Wal-Mart and Costco require more certifications.

Recommendations

If the opportunity for local, sustainable producers to access Manitoba's large institutional markets is to be realized there are a number of changes that will be required. These changes need to come from multiple stakeholders. These changes are required at multiple levels from kitchen staff to institutional administrators to the provincial government. This includes addressing barriers such as price, education and improving market access for smaller-scale local, sustainable food producers:

Recommendations for Institutions

Below are a number of recommendations for institutions, including ways to address price constraints, address barriers within contractual agreements, improve transparency, and create a policy framework within institutions for purchasing local and sustainable foods.

Address Price Constraints

Start small and build on success for local and sustainable food purchasing

- Local food items such as bread, cheese and eggs are examples of food items that are price competitive with comparable imports. Most distributors and grocery chains will carry these products. See appendix A for the top 10 food items institutions can purchase from Manitoba.
- Hosting special events within institutions that feature local, sustainable food products and/or switching a few key items is a positive way begin to implement local and sustainable food items while staying with budget constraints.

Buy local food in season and preserve it

- Supplementing menu plans with locally available in-season products is often as price competitive as buying imported items. Freezing, canning and preserving local are methods to extend the use of local foods year round. This is especially relevant for smaller home economics classrooms and institutions that have the labour force to process food from scratch.
- Invest in the infrastructure required to store preserved foods.

Consider the quality of the food item, portion sizes, and reduce waste

- Some institutions have found that local, sustainable meat products are price competitive when cooked weight rather than raw weight is measured. Local meat may contain less fat or water than some imported competitors.
- Reducing waste, whether taking a close examination of the amount of food wasted from meals purchased, or by utilizing vegetable scraps into soup stock, a reduction in food wasted is a reduction of money wasted.

Implement scratch cooking to make healthy meals made with local and sustainable food

- Require distributors to provide reporting related to the local and/or sustainable food products provided to increase clarity about how much local sustainable food is being purchased.

Address Barriers within Contractual Agreements

Shift the way that food service contracts are awarded

- While awarding and writing food service contracts, institutions can incorporate requirements related to local and sustainable food. This is an opportunity for institutions to provide clear definitions of “local” and “sustainable” food as well as establishing clear targets.
- Require distributors to provide reporting related to the local and/or sustainable food products provided to increase clarity about how much local sustainable food is being purchased.

Improve Transparency

Promote Local and Sustainable Foods being purchased

- With increased clarity built into food service contracts, institutions can highlight and promote the local food items being purchased and served. This will both raise the profile of local, sustainable foods in Manitoba and respond to consumer interest and highlight positive actions taken by the institution.

Establish direct relationships with local businesses and producers

- There are opportunities for institutions of all sizes to establish direct relationships with local producers or processors. These long-term relationships can increase transparency, build trust, and reduce the time required to purchase local products. There also provide opportunities for mutually beneficial promotion.

Create a Policy Framework with Institutions

Create internal policies for local food purchasing within institutions

- Internal policies, mandates and purchasing guidelines within an institution can be an effective way of establishing guiding principles prioritizing local and sustainable food.
- Champions within the food service operation, particularly higher administration and dedicated food buyers are necessary for creating and abiding by internal policies, targets and long-term goals towards increasing local and sustainable food purchases within an institution.

Recommendations for the Province of Manitoba

Below are a number of recommendations for the provincial government, including policy recommendations, support to improve tracking local and sustainable food purchases, further exploring the relationship between provincially inspected abattoirs and institutions, and supporting educational opportunities.

Policy

Meet a commitment to a 20 percent target of government food procurement that is produced in Manitoba and purchased from Manitoba farmers and processors under the *Farm and Food Awareness Act*.

- Provide a clear definition of local food

- Under climate change regulation, re-visit and improve targets under a specified timeline (i.e. 5 years)
- Address price barriers for local food procurement within government institutions (i.e. increase food budgets within government institutions, conduct waste audits and manage food waste, support opportunities for local food to be grown on institutional properties, purchase and preserve local foods in season)
- Provide support and training for government institutional buyers (including funding, resources and support for kitchen equipment and opportunities to increase scratch cooking with whole local foods)
- Provide support for local producers, especially small-scale specialty producers entering the retail market (i.e. business mentorship opportunities, certification and training opportunities)

Meet a commitment to purchase organic, local food

- Although procuring local food is important, local and organic food supports producers and processors that have demonstrated sustainable agriculture practices in our province. This is an important strategy for reducing greenhouse gas emissions and supporting the goal to nurture organic farming practices under the Climate Change and Green Economy Action plan
- Government institutions should be required to purchase a percent of local and organic food (for example, 5 percent with a goal to increase purchases over time)

Require food service contracts to include clear definitions of local and sustainable food, and clearly state targets and long-term goals for local food procurement.

- Government-funded institutions, such as healthcare institutions operating under the Regional Health Authority have large purchasing power and their purchasing decisions can have significant impacts on the local food economy. Food Service contracts should go beyond purchasing food for best value at the lowest cost. Despite realities of international trade agreements, RFP's can state other specifications, such as freshness, time of delivery, and GHG reductions, which can promote and prioritize local food. Institutions with food for re-sale have the ability to state clear objectives for purchasing local and sustainable food. This can include an increase in the amount of local food procured annually, a commitment to scratch-cooking or working with suppliers with organic certifications
- Enable procurement staff to consider factors that contribute to broader economic benefit in addition to the cost of the product

Support and Improve Tracking Local, Sustainable Food Purchases

Measure and track the amount and type of local, sustainable food being purchased within government-funded institutions

- Although this project tracked local and sustainable food purchases from eight institutions, much is still needed to further understand the amount of local, sustainable foods being procured. Mandatory participation and stronger involvement from distributors and food service management companies will increase accuracy, transparency and knowledge around the type and amount of local, sustainable food purchased within government-funded institutions

- The process of manually sorting through purchasing information was time consuming and inefficient. An online database could be created to make it simple for institutions to provide their purchasing information for government. This could also contribute to creating metrics to show the impacts of purchasing from the local food sector

Further Explore the Relationship between Institutions and Provincially Inspected Abattoirs

Explore the shift towards federally inspected meat in large scale institutions with contracts and explore opportunities to market provincially inspected products

- Some healthcare institutions, particularly hospitals, in Manitoba no longer purchase meat from provincially inspected abattoirs. More is needed to understand the shift towards no longer purchasing provincially inspected meat within some institutions and further understand the drivers for exclusively purchasing federally inspected meat. Future policies can require that institutions do not exempt provincially inspected meat within their contracts.

Support Educational Opportunities

Support educational and networking opportunities between producers and buyers

- Further supporting networking opportunities, such as events similar to Get Fresh can be an easy but effective way to build relationships between institutional food purchasers with local producers and processors. This networking opportunity could be carried out through existing events, such as the annual Direct Farm Marketing conference.
- Creating online resources to connect food buyers with local and sustainable producers and provide local, sustainable producers with free online marketing opportunities.
- More education is needed to inform institutional food buyers of current food safety regulations related to local food to shift current perceptions that local food may be less food safe. More education is needed to inform buyers about the difference between provincially and federally inspected meats.

Support local and sustainable food procurement in school programming centered on sustainability

- Guides such as the Guide for Sustainable Development in Schools (2nd) edition dovetail nicely with creating specific goals around procuring local and sustainable food in Manitoba schools- such as gardening, partnering with local producers and food organizations or preserving local food in cafeterias.

Further support smaller scale local producers in accessing the institutional market

- Provide support to local producers with an interest in selling to the retail market with necessary tools, information, and access to certification and training programs. This can include an overview of what institutional buyers need and expect. This can also include food safety requirements needed to sell to institutions.

- Support initiatives related to improving distribution networks of small-scale local producers to access food buyers, such as a Food Hub.
- Continue to address recommendations put forward in “Advancing the small scale, local food sector in Manitoba: A path forward”.

Conclusion

The local food system has recently been recognized by the provincial government as an opportunity to support Manitoba's economy and reduce our environmental impact. In order to support and grow a vibrant local food economy, Manitoba's institutions will play an important role. Action from multiple stakeholders, including government, local food producers and processors, distributors and institutional food buyers is required to improve and support local and sustainable food procurement on a large-scale. Although challenges currently exist, there are leaders in our province that illustrate innovative ways of supporting the local food movement.

Looking forward, important changes are needed within our food services and programming in order to meet goals and commitments set out by the provincial government. Food service operations must be viewed as more than a revenue stream for an institution, but also an important place for creating healthier and more sustainable environments. Change will be needed from institutions of various sizes. For large-scale institutions, food service contracts will need to go beyond the current model of purchasing food for the best value at the lowest cost. Despite realities of international trade agreements imposed on government institutions, RFP's can begin to state other specifications such as freshness, time of delivery, reducing greenhouse gas emissions, or purchasing from suppliers with a third party sustainability certification, such as organic.

Small to mid-scale institutions can create goals for purchasing local and sustainable food, and establish a clear mandate or vision in doing so. Internal support is needed from both institutional food buyers and higher administration. Strategies such as reducing waste, buying and preserving Manitoba foods in season, growing food within the community, re-shaping menus to highlight local and sustainable foods and buying whole ingredients are among some of the examples of ways to increase local food procurement. Educational and promotional opportunities is also an important strategy for increasing awareness within institutions.

Lastly, more support is need to strengthen the network between local producers, distributors, and food buyers. Local and sustainable producers and processors, particularly those that are interested but have little market access will need to be supported by the provincial government to assist in training, education, marketing, and access to institutional markets. At the same time, support is needed to improve distribution channels that local, sustainable producers can access. In addition, a commitment to purchase local food within government institutions should incorporate not only local producers and processors already well-established within the retail market, but also smaller-scale local producers and business that have the desire and capacity to supply to institutions.

With strong policy and collaborative efforts between producers, buyers, and distributors, local, sustainable food procurement in institutions can become an integral strategy for building a vibrant market for our agricultural products while supporting a green, resilient future for Manitoba.

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APPENDIX A: Top 10 Food Items to Buy from Manitoba

1. Eggs
2. Baked Goods (example: breads, pasta)
3. Cheese
4. Butter
5. Grains (example: flour, wild rice, oats)
6. Beans (example: navy beans, pinto beans)
7. Produce (example: root vegetables, seasonal vegetables, greenhouse grown vegetables)
8. Condiments (example: honey, jams, mustard)
9. Seafood (example: walleye, whitefish)
10. Meat (example: poultry, beef, pork, and bison)

Appendix B: Methodology

Table 1: An Example of the Methodology Used to Track Local and Sustainable Food Purchases:

Category	Brand	Items	Total Amount	Local	Sustainable	Local/Sustainable
Dairy	Kraft	Cheddar	\$110.91	\$0.00	\$0.00	\$0.00
Dairy	Bothwell	Marble	\$57.67	\$57.67	\$0.00	\$0.00
Dairy	Notre Dame	Butter	\$27.00	\$27.00	\$0.00	\$0.00
Dairy	Kraft	Aged Cheddar	\$58.75	\$58.75	\$0.00	\$0.00
Dairy	Daisy	Sour Cream	\$30.00	\$0.00	\$0.00	\$0.00
TOTAL			\$284.33	\$143.42	\$0.00	\$0.00

Total Dairy Local Purchases: $(\text{local purchases}/\text{total amount}) \times 100 = 50.44\%$

Total Dairy Sustainable Purchases: $(\text{Sustainable purchases}/\text{total amount}) \times 100 = 0.00\%$

Total Dairy Local & Sustainable Purchases $(\text{local and sustainable purchases}/\text{total amount}) \times 100 = 0.00\%$

Table 2: An Example of Determining Local and Sustainable Food Purchases Within One Food Category:

Category	Brand	Item	Total Amount	Local Purchases	Sustainable Purchases	Local & Sustainable Purchases
Condiment	Elmans Kosher Deli	Horseradish	\$57.75	\$57.75		
Bread-Pasta	Nature's Farm	Pasta, Organic	\$102.50			\$102.50
Produce	Sys IMP	Pineapple	\$20.75			
Produce	Del Monte	Banana, Organic	\$6.50		\$6.50	
Baking Item	Luglio	Balsamic Vinegar	\$17.40			
Meat	Granny's	Chicken	\$118.75	\$118.75		
TOTAL			\$317.15	\$176.50	\$6.50	\$102.50

Total Local Percentage: $(\text{Local Purchases}/\text{Total Amount}) * 100 = 55.65\%$

Total Sustainable Percentage: $(\text{Sustainable Purchases}/\text{Total Amount}) * 100 = 2.04\%$

Total Local & Sustainable Percentage: $(\text{Local \& Sustainable Purchases}/\text{Total Amount}) * 100 = 32.31\%$

Appendix C: Results from Participating Institutions

Table 1: Percentage of Local and Sustainable Food Purchased by Institutions

Institution	Total Local Percentage²	Total Local Sustainable Percentage³	Total Local and Local Sustainable Percentage	Total Sustainable (not from MB) Percentage⁴
Institution 3	53.9%	10.1%	64.0%	0.0%
Institution 7	41.5%	8.9%	50.4%	41.0%
Institution 5	18.3%	0.3%	18.6%	.01%
Institution 1	7.8%	0.0%	7.8%	0.0%
Institution 6	5.7%	0.0%	5.7%	1.43%
Institution 2	5.4%	0.0%	5.4%	0.2%
Institution 4	2.5%	0.0%	2.5%	0.0%

²'Local' food has been defined as food produced or processed in Manitoba, in accordance with the 'Buy Manitoba' definition.

³'Local and Sustainable' food has been defined as food that has been produced/processed from Manitoba that has Organic certification.

⁴'Sustainable' Food has been defined as food that hasn't been produced/processed in Manitoba but has Organic certification.

Table 2: How Food Had Been Purchased and the Number of Suppliers Used

	Locally Owned Distributor (example: Worldwide)	Local Business (example: Delucas)	Multi-National Distributor, Sysco	Grocery Store (example: Costco)	Food Service Management Contract with Aramark
Institution 3	5	7	1		
Institution 6				3	
Institution 4		1	1		
Institution 7	1	5		2	
Institution 2	1		1		1
Institution 1 - Phase 1	3				
Institution 1 - Phase 2			1		
Institution 5 a	1	4			
Institution 5 b	2	2		4	
Institution 5 c	1	2		1	
Institution 5 d		2	1	1	1

Table 3: Local Food Brands Purchased by Participating Institutions

Food Category	Local Brands	Number of institutions who bought
Dairy	Bothwell Cheese	6
	Notre Dame Creamery	2
	Saputo Dairy- select items	2
	Prairie West Ice Cream	1
Grain	Prairie Mills Flour- Organic	2
	Prairie Mills Flour	2
	Canoe Wild Rice	2
	Derucky's Top of the Hill Farm	1
	Cava Nuda	1
	Shoal Lake Wild Rice	1
Meat	Granny's Poultry	6
	Dunn-rite chicken	5
	Maple Leaf Foods-select items	2
	Sunpeak Chicken	2
	H.M.S Foods	1
	Local Beef (Worldwise Distributors)	1
	Local Turkey (Worldwise Distributors)	1
	Local Pork (Mariner Neptune)	1
	Local Bison (To-Le-Do)	1
	Zinn Farms	1
	Northern Meat Service- Marbled Manitoba	1
Bread and Pasta	Northern Meat- pork	1
	Hylife Pork	1
	City Bread	6
	Nature's Farm	4
	Gunn's Bakery	2
	Creative Pizza Crust	2
Eggs	Deli world	1
	Tall Grass Prairie	1
	Nature's farm	7
	Countryside Farms- VITA	3
Produce	Countryside Farms	2
	Burnbrae	2
	Loveday mushrooms	6
	Chinese Universal sprouts	3
	Schreimers cucumber	2
	Peak of the Market	2
	Greenland Garden tomatoes	2
	Fresh Option Organic Delivery	1
J. Berard	1	
Baking items	Lakeside Colony	1
	Bunge Canada	1
Condiments	Harvest Time Beans	1
	Greetalia Honey Dill	3
Fish	Local Fresh Water Fish (Mariner Neptune and Independent Fish)	3
Prepared Foods	Naleway Foods	3
	John Russell Honey	1
	Barkman Honey	1
	Elmans	1
Confectionary	La Cocina	1

Appendix D: Results from Rural Institutions

Table 1: Results from Interviews with Rural Institutions

Name	Location	Type of Institution	Near an abattoir	In a contract or work with a distributor	Buying Provincially Inspected meat?	Buying other local food?	Other
Agassiz Youth Center	Portage La Prairie	Correctional	X	X			Meat cutting program
Altona Community Memorial Health Center	Altona	Healthcare	X	X			
Ecole Arthur Meighen	Portage La Prairie	Education	X			X	
Benito School	Benito	Education	X		X		School garden
Brandon Support Services	Brandon	Healthcare	X			X	
Border Valley School	Winkler	Education	X				Garden and farm club
Bossevain School	Bossevain	Education	X				
Carman Memorial Hospital	Carman	Healthcare	X	X	X	X	Has bought local fruit
Crocus Plains Regional School	Brandon	Education	X	X		X	
Elmwood School	Altona	Education	X				School greenhouse & garden
Genesis House	Winkler	Shelter	X		X	X	
Gimli High School	Gimli	Education					
Major Pratt School	Russell	Education					
Melita School	Melita	Education	X		X		
Minitonas Middle School	Minitonas	Education	X		X		Farm 2 School Fundraiser
Neepawa Area Collegiate Institute	Neepawa	Education	X			X	
Niverville Personal Care home	Niverville	Healthcare	X	X			
Northern Health Region	The Pas	Healthcare	X	X			
Parkside Children's Center	McCreary	Daycare	X		X		
Portage Service for Seniors	Portage La Prairie	Healthcare	X		X	X	
Riverton Collegiate Institute	Riverton	Education					Internal policy to buy from local businesses
Steinbach Regional Secondary School	Steinbach	Education	X	X			
Starbuck School	Starbuck	Education					Farm 2 School fundraiser, buys from a local butcher
Swan Valley Healthcare Center	Swan Valley	Healthcare	X	X			
Tabor Home	Morden	Healthcare	X	X			
Tanners Crossing School	Minnedosa	Education	X			X	
Victoria Park Lodge	Souris	Healthcare	X		X		
University College of the North	The Pas	Education	X	X	X		
Westman Nursing Home	Virden	Healthcare	X	X			

Appendix E: Purchasing Changes at Manitoba Liquor & Lotteries

Table 1: Total Food Purchases made in October & February at Manitoba Liquor & Lotteries (2013/2014)

Food Category	October & February 2013- total spent on food category	October and February 2015- total spent on food category
Dairy	51,687.65	60,530.86
Meat	235,122.30	285,716.62
Eggs	5,567.19	3,625.38
Grains	3,171.28	3,029.44
Bread and Pasta*	11,977.69	5,895.51
Condiments	35,635.06	39,712.53
Confectionary	5,192.70	5,263.86
Produce	75,546.06	98,311.08
Baked Goods	33,205.96	30,556.43
Prepared Foods	35,547.55	24,331.60
Baking Items	22,168.52	29,880.20
Fish*	105,134.80	62,612.67
Total spent on Food Overall	620,015.16	647,282.76
Total spent on Local Food Overall	53,176.80	123,777.94

*This information reflects the total amount of money spent at Sysco in 2015. Local Bread was also purchased from Gunn's Bakery, and Local Fish was purchased from Freshwater Fish Marketing Corporation.

Appendix F: Provincial and Federal Meat Inspection

Table 3: Differences between Provincial and Federal Meat Inspection

Food Safety Standards	Provincially Inspected Meat	Federally Inspected Meat
Can be shipped and sold in Manitoba	✓	✓
Can be shipped and sold inter-provincially and worldwide		✓
Inspected and registered federally by the Canadian Food Inspection Agency (CFIA)		✓
Inspected and registered provincially by Manitoba Agriculture, Food and Rural Development (MAFRD)	✓	
Adhere to Hazard Analysis Critical Control Point (HACCP) Program	Some adhere to HACCP	✓
Good Manufacturing Practices (GMP) Program	✓	
Food Safety regulations use an outcome-based approach	✓	
Food Safety regulations use a prescriptive approach		✓