

MANITOBA ALTERNATIVE

FOOD PRODUCTION & FARM MARKETING MODELS

**COMMUNITY SHARED AGRICULTURE
FARMERS' MARKETS
HUMANE SOCIETY CERTIFIED LABELING PROGRAM**

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NOVEMBER 2004

**A Project of the Manitoba Research Alliance on Community Economic
Development in the New Economy**

EXECUTIVE SUMMARY

New technologies have increased production and yields in a number of agricultural sectors in the Manitoba economy. Yet the associated agricultural industrialization has not been kind to farming communities; the family farm that is their backbone is in crisis. While agricultural production is growing, the number of farms and farmers are falling, as market power becomes increasingly concentrated in the hands of an ever-smaller number of firms, and large-scale corporate farms become the norm. Net farm incomes have fallen to 1930s levels. In Manitoba, government agriculture policy remains largely focused on exports, with extensive public support for the production and processing of hogs, potatoes, and genetically modified canola – all of which can impact the long term sustainability of the environment. As a result of all of these factors, Manitoba fares poorly on measures of food security or self-sufficiency, and environmental sustainability.

This project conducted research into three alternative food production and farm marketing models: community shared agriculture; The Winnipeg Humane Society Certified labeling program for dairy and meat products; and the Direct Farmer Market Retail Program. These models, all of which have been implemented on at least a trial basis in Manitoba, have the potential to provide greater self-sufficiency to producers in Manitoba, while increasing local food security by providing fresh local food to the consumer. They also offer potential environmental benefits by reducing the distance food travels “from gate to plate” and, where organic practices are in place, reducing the use of synthetic chemicals, growth hormones and genetically modified organisms. Main methodologies included reviews of the literature and key documents, case studies, interviews, and surveys.

The authors conclude that the CSA model does not provide a simple solution to economic, social or environmental challenges, but rather it represents one niche option available to farm families.

The farmers’ market model provides an opportunity for vendors, including farmers, to diversify their incomes. While the immediate economic impact of farmers’ markets is likely to remain small for the foreseeable future, the model holds numerous other important benefits for rural communities. The addition of farmers’ market participation to a livelihood portfolio would appear to represent an attempt to increase the standard of living for farm families, rather than a specific poverty-alleviation strategy.

The Winnipeg Humane Society Certification program holds considerable potential, however it has run into serious problems with what might be considered “branding” issues. The term “humane” would appear to be a marketing liability; perhaps the most likely alternative, “natural,” suffers from the fact that unlike “organic,” there are no standards for objective certification.

The report concludes with a number of recommendations that would benefit small farms and farm communities, enhance environmental sustainability, and make Manitoba more food-secure. Most of these would be at the level of provincial government policy, as Manitoba currently does not have a provincial food-security policy.

ACKNOWLEDGEMENTS

The research advisory committee for this project was made up of representatives of The Organic Food Council of Manitoba, National Farmers' Union, and Dungannon Consulting Services. Committee members included Vicky Burns, Janine Gibson, Blair Hamilton, and Fred Tait. Thanks to Anne Lindsey and the Manitoba Eco-Network, Inc., and to Jim Silver and Parvin Ghorayshi from the University of Winnipeg.

We would like to thank the Manitoba CSA farmers for sharing their time, insights, and experiences. Special thanks to the farmers' market vendors, CSA and farmers' market consumers, and key informants who took time to participate in the study. Many farmers market coordinators and Home Economists and other staff with the department of Manitoba Agriculture, Food and Rural Initiatives assisted in the distribution and administration of farmers' market vendor and consumer surveys.

Faculty from the University of Guelph's School of Environmental Design and Rural Development including David Douglas, John FitzSimons, and Harry Cummings, along with Rod MacRae and Tony Winson, provided advice and insights.

We are happy to acknowledge the generous financial support of the Initiative on the New Economy of the Social Sciences and Humanities Research Council; via the Manitoba Research Alliance on Community Economic Development in the New Economy. For further information please see:

<http://www.brandonu.ca/organizations/rdi/MRA.html>

We would like to also note that certain sections of this report have served a dual purpose in allowing Ms. Kreesta Doucette to complete her Masters Thesis (Manitoba Harvest: Rural Livelihood Contributions of Community Shared Agriculture & Farmers' Markets, 2004) at the Department of Rural Planning and Development, University of Guelph, Ontario.

1.0 INTRODUCTION

The emerging technology-based economy (New Economy) has provided opportunities for growth in certain agricultural industries in rural Manitoba, such as the rapidly expanding livestock industry, the potato industry, and the genetically modified canola industry. Technology-based production techniques, including use of genetically modified organisms and food biotechnology, have increased agricultural production rates (Van Acker, 2003). Yet the growth in certain portions of the agricultural sector has actually been accompanied by a *reduction* in the number of farmers in Manitoba and across Canada; the new economy and the accompanying technology-based industrialized model have benefited large (often transnational) agri-business corporations, to the detriment of the family farm. As noted in *Canada's Action Plan on Food Security*, "the agricultural and agri-food sector has undergone major changes over the last decade. Industry rationalization and technological innovation in the food production and processing sectors have increased productivity, albeit with newer and larger plants with fewer employees." (Agriculture and Agri-Food Canada, 1998).

The adoption of production practices seen as necessary to remain "economically viable" (for intensive high input/output farming) has led to agricultural industrialisation, increasing input costs and greater reliance on bank loans (*Something's Wrong Somewhere: Globalisation, Community and the Moral Economy of the Farm Crisis*, Christopher Lind (1996)). These factors, along with steady decline in grain prices since the 1980s, high interest rates in the early 1990s, and the withdrawal of government agricultural subsidies, have resulted in increasing debt and farm bankruptcy. It is apparent that the benefits of technological advances and the resultant large-scale industrial model of agriculture have not benefited the rural agricultural community as a whole. Indeed, it is no exaggeration to say that small and family farming in Canada is in crisis.

John Ikerd (2002) defines agricultural industrialization as a three-stage process that is led by industrial specialization, followed by standardisation, and finally consolidation, in which fewer people (or corporations) hold decision-making power. The result of the final stage is what has come to be known as vertical and horizontal integration, in which "horizontal" refers to a company merging with another company in the same line of business, and "vertical" to mergers between firms up and down the supply chain, such as a fertilizer company merging with a food processing company. Both vertical and horizontal integration tend to reduce competition and increase the relative power of the new firm in the marketplace (Ikerd, 2002).

The Manitoba Eco-Network, in partnership with the National Farmers Union and the Organic Food Council of Manitoba, set out to investigate three separate producer/consumer food models currently operating in Manitoba: community shared agriculture; The Winnipeg Humane Society Certified labeling program for dairy and meat products; and the Direct Farmer Market Retail Program. These models have the potential to provide greater self-sufficiency to producers in Manitoba, while increasing local food security by providing fresh local food to the consumer. As a primary principle, these models aim to reduce the distance food travels "from gate to plate." In addition, where organic practices are in place, they have the potential to reduce the use of synthetic

chemicals, growth hormones and genetically modified organisms. The researchers also hypothesized that these food models achieve another, equally important goal, namely increasing the producer's share of the market at the farm gate.

Intended Project Tasks

The researchers identified six key tasks for the project:

1. To document identified producer/consumer food models in operation in Manitoba.
2. To briefly review a limited number of similar producer/consumer models in other jurisdictions relevant to Manitoba's needs.
3. To investigate potential obstacles hindering market share growth of models including impacts of the New Economy and current laws, regulations and policies in place by government.
4. To identify successful strategies and tools that benefit producer/consumer food models.
5. To identify potential tools and strategies within the principles of community economic development (CED) and the new economy, which may benefit the producer/consumer food models under study.
6. To develop theoretical producer/consumer food model(s), based on the findings from project Tasks 1 to 5, which would potentially capture the basic principles of CED and the three producer/consumer food models under investigation.

The intention is that the identified theoretical model(s) may have practical application within many agricultural food sectors in Manitoba.

2.0 THE FARM CRISIS

Agriculturally based communities have been disproportionately hurt by the global market, and many analysts attribute the main cause of the farm crisis to agribusiness consolidation. In "*The Farm Crisis and Corporate Power*" Qualman (2001) demonstrates that ever-fewer corporations are controlling a large and growing share of the inputs and outputs associated with the food industry chain. Ownership concentration, along with a decreased number of purchasers of agricultural products in the agri-food industry, results in low competition and pricing options for farmers. For example:

Two transnationals – Cargill and Tyson – kill and pack the bulk of Canadian beef. Three transnationals make most of our cereal. Five retail most of our food. Farmers have just three major tractor manufacturers to choose from – half the number that existed 15 years ago. In Canada, each link of the agri-food chain is dominated by fewer than ten (and often as few as two) multi-billion-dollar transnationals. (Qualman, 2001)

Agriculture and Agri-Food Canada acknowledges the farm crisis in its Medium Term Policy Baseline report, noting, "many parts of the agri-food sector are experiencing an accelerated rate of industry concentration, throughout the food chain. This global phenomenon is raising concerns over market power. It has reached such a level ... that some players wonder whether the market power that may be the outcome, may be partially responsible for the farm income crisis." (Agriculture and Agri-Food Canada,

2001).

A review of Canada and Manitoba's agricultural economy confirms the existence of a farm-income crisis arising from the industrial model. While the gross value of agricultural production in Manitoba increased by 23 percent between 1997 – 2001 to approximately \$3.7 billion dollars, realized net farm income has been largely static (Manitoba Agriculture and Food, 2003). Figure 2.0 shows that realized net farm income across Canada have fallen, in many cases to levels not seen since the 1930s (National Farmers Union, 2004).

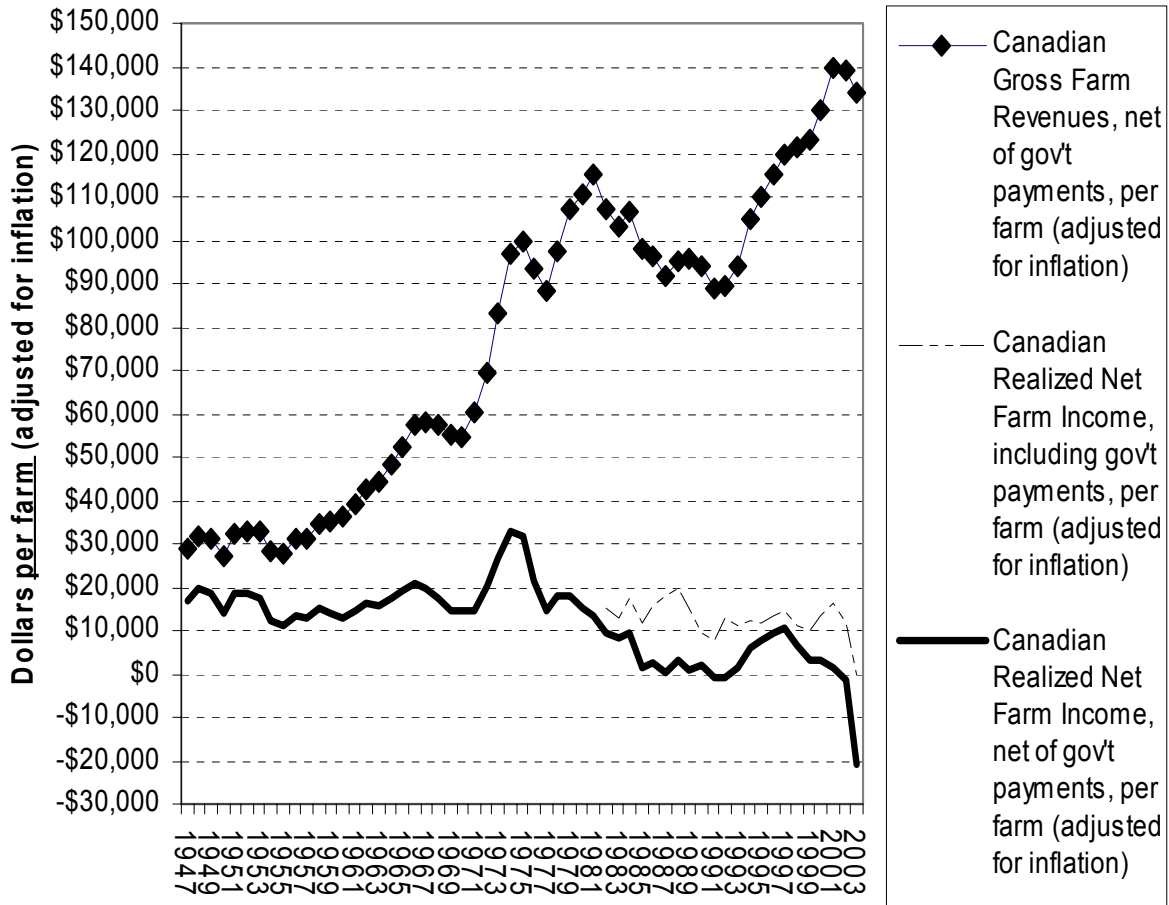


Figure 2.0 Canadian Farm Income in 2003 Dollars (National Farmers Union, 2004)

Manitoba's farms have increased in average size from 784 acres in 1996 to 891 acres in 2001, a 14 percent increase over five years (Manitoba Agriculture and Food, 2002). A similar expansion in size has occurred within segments of the livestock sector. In particular, intensive hog operations have nearly doubled in average size to 1250 hogs per operation over the same time period (Manitoba Agriculture and Food, 2003). Weida attributes much of the depopulation of rural North America to the presence and growth of concentrated animal feeding operations or intensive livestock operations (Weida, 2002).

New technology has led to substantial increases in yields in Manitoba's major crops, and in the overall value of agricultural production. However, although farm

operations have grown larger, fewer people are farming, and the financial benefits of increased production have not been passed on to farmers. Between 1997 and 2001, there was a loss of slightly more than 3,200 census farms in Manitoba, approximately a 14 percent decrease (Manitoba Agriculture and Food, 2002). Manitoba Agriculture reports that the decline in farm numbers from 1996 to 2001 was the largest ever over a five-year period.

The symptoms of the farm crisis are unmistakable in Manitoba; another grave economic statistic reveals that outstanding farm debt amounted to a record high of over \$4 billion dollars in the province for 2001, (or roughly \$200,000 per farm) an increase of 43 percent from five years earlier (Manitoba Agriculture and Food, 2002). In other regions of the country, we see a similar story. In Atlantic Canada, the use of farm economic viability as one indicator of genuine economic progress was measured for the first time anywhere in Canada. The figures revealed that total farm cash receipts had risen over the previous 28 years of measurement, but all other indicators of economic viability revealed negative trends (Scott, 2001). These indicators included net farm income, expense-to-income ratio, return on investment, debt-to-net income ratio, direct payments to producers and dependency ratio. Such results suggest that conventional indicators, such as gross farm output and total farm cash receipts, can be very misleading as indicators of economic well-being and that farm sector economic health in Atlantic Canada is in serious decline.

Peter Stonehouse (2001) characterizes modern agriculture as a farming and food-processing system heavily dependent on sophisticated technologies, intensive resource usage, large-scale size of operation and extreme capital-labour substitution. Modern agriculture espouses the use of genetically modified organisms; synthetic hormone and antibiotic usage to boost animal output; routine application of synthetic and chemical herbicides and pesticides; and irradiation and food preservative usage to extend shelf life. Modern agriculture is a product of the open market system driven by the need to be globally competitive. Stonehouse summarizes the resulting farm crisis as follows:

The only gainers from the industrialization of the agri-food sector have been food consumers (cost wise and convenience wise) and large agri-business corporations that are seeing their market shares expand. Losers include the majority of farmers, who are increasingly merely managers for agri-business corporate bosses; consumers of nature, particularly of natural habitat and biodiversity; many flora and fauna species and domesticated livestock species.

Across the province various organizations such as the Turtle Mountain Community Development Corporation's Agriculture Committee are asking such crucial questions as How do we make sure the profits from farming stay close to home so that we can confidently encourage our own youth to farm? How do we (re)establish the farming of this land as a cooperative effort? (Turtle Mountain Community Development Corp. 2004). At a recent conference held in Brandon, the Agricultural Renewal Alliance (2003) asked, "In face of heightened risk due to climate change, tightening margins, increasingly intense competition in the global marketplace, concentration and consolidation in both the input and output sectors, can today's generation of farmers and rural residents continue to aspire to a rewarding life on the Prairies?"

3.0 SHIFTING FROM GLOBAL TO LOCAL: GLOBAL FOOD SECURITY AND SUSTAINABLE AGRICULTURE

The global economy's creation of a geographical dislocation and psychological disconnect between producers and consumers have given regional and community economics a new urgency. "Thinking globally and eating locally" is a concept that has been rising in popularity across the globe. It is part of an overall global food-security movement countering the large-scale specialized and industrialized agri-food industry operating in a centralized global market. Examples include Italy's slow food movement, Toronto's Foodshare, and Vancouver's FarmFolk/CityFolk. Many such organizations see themselves as part of a movement for food security, defined by the Centre for Studies in Food Security as "a condition which all people at all times can acquire safe, nutritionally adequate and personally acceptable foods that are accessible in a manner that maintains human dignity. It requires attention to the production and supply of adequate quality and quantity of food, and people's ability to acquire those foods." (Centre for Studies in Food Security, 2003).

The Saskatchewan Food Security and Food Democracy Network (2001) adds to this definition the condition that "this food must also be produced in ways that are environmentally sound and socially just." Local food activist and organic grower Celia Guilford witnesses the changes that have come about in her community for the past 15 years and describes the "loss of farmers, loss of community services and rural depopulation – brought on by low prices and a lack of appropriate supports for farming. If we want to have food security, we have to have farmers ... there aren't too many out there that can afford to be farming." (Koc, MacRae, 2001). Janine Gibson, co-chair of the Organic Food Council of Manitoba, emphasizes that her definition of food security includes "knowing that my food has come from local farmers, that the farmer and food has been treated with respect and that the people in my community can afford good quality food." (Gibson, 2003).

In their book *"Bringing the Food Economy Home,"* Norberg-Hodge, Merrifield, and Gorelick (2002) cite a small but rapidly growing groundswell of support for local food systems where consumers and farmers are forging links to promote smaller scale, more diversified and ecologically-sound agriculture. John Ikerd describes the emergence in the US of "New American Farmers" who farm holistically, rejecting conventional agribusiness thinking that holds that specialization is the key to success. He states that these farmers look at the farm as a whole, not at individual specialized activities. They diversify instead and create productivity out of that diversity (Ikerd, 2002).

Research has shown that small to medium-sized family farms may be more efficient than large ones. As past president of the National Farmers Union, Cory Ollikka argues, "I defy you to find anyone more efficient than your small, medium-sized family farm that has two, sometimes three off-farm jobs" (Qualman 2000). Kimbrell (2002) reports that various studies have shown that smaller farms using sustainable agriculture practices utilize fewer external chemical inputs resulting in lower costs of production, and thus greater efficiency. Rosset (2002) agrees and indicates that the unsustainable nature of conventional agricultural practices is masked by current methods of measuring agricultural efficiency and productivity.

MacRae (1991) defines sustainable agriculture as “both a philosophy and a system of farming ... having a set of values that reflects an awareness of both ecological and social realities. It involves design and management procedures that work with natural processes to conserve all resources and minimize waste and environmental damage, while maintaining or improving farm profitability. They are designed to maximize existing soil nutrients and water cycles, energy flow, beneficial soil organisms and natural pest controls.”

Pretty (1995) includes the notion that sustainable agriculture aims for an increased diversity of enterprises within farms, combined with increased linkages and flows between them. By-products from one component or enterprise become inputs to another. As natural processes increasingly substitute for external inputs, so the impact on the environment is reduced.

Some would argue that organic agriculture is the only form of genuinely sustainable agriculture, as the reliance on external inputs to the farm process introduces elements of unsustainability. Organic farms have the potential to play key roles in maintaining both environmental and social diversity. Genetic diversity is also more likely to be preserved by organic family farms. Kimbrell (2002) cites a UNFAO report that in this century the world has lost three-quarters of its agriculturally related genetic diversity. Vandana Shiva (1999) describes the “biodiversity intensification” necessary as an alternative to the corporate globalization of agriculture can only be conducted on small farms.

An important component of sustainable agriculture is that food trade becomes more localized. MacRae (1991) argues that a truly sustainable food system requires nations such as Canada to be much less dependent on the import-export economy and to strive for greater self-reliance. The Toronto Food Policy Council (1994) cites Meeker-Lowry’s definition of self-reliance as follows: “Self-reliance in socio-economic systems has its analogue in natural systems. As a general rule of natural process, energy and subsequent action are captured or expended as close to the point of origin as possible.”

In 2000, 817 million tons of food was shipped around the planet, a four-fold increase since 1961 (Halweil, 2002), while human population doubled over the same period. A key benefit of local food systems is that food miles – the distances food travels before reaching the consumer – are relatively low (Norberg-Hodge et al., 2002). The average North American food item typically travels 2500 –4000 km, (Halweil, 2002) changing hands at least six times (Schueller, 2001).

One of the greatest environmental issues facing the globe today relates to human impact on climate. Norberg-Hodge et al. (2002) suggests that one of the strongest arguments in favour of shifting to local food systems is that they use far less energy and produce less pollution and greenhouse gases. Halweil (2002) cites research by Anika Carlsson-Kanyama of Stockholm University which shows that a basic diet – some meat, grain, fruits and vegetables – with imported ingredients can easily account for four times the energy and four times the greenhouse gas emissions of an equivalent diet with ingredients from domestic sources. The benefits of a local sustainable food economy are summarized in Table 3.0

Table 3.0 Benefits of a Local Sustainable Food Economy (Compiled from Halweil 2002, Manitoba Agriculture, Food and Rural Initiatives 2004, Organic Food Council 2003)

Environmental Benefits	People Benefits	Community Benefits
Shorter travel distances in food shipped – overall reduction in greenhouse gas emissions – reduced packaging	Food is fresher, tastier and healthier – less reliance on chemical inputs, preservatives and genetically modified organisms	Improves local economy by retaining wealth within community with employment and food businesses
Reliance on small scale diversified and mixed farming systems, which promotes soil conservation and utilizes less water and non-renewable resources	Connects rural farming families with consumers of food – educates consumers – builds social cohesion	Provides greater return of food market dollar to farming families in the region
Preserves genetic diversity and contains no genetically modified organisms	Builds new skills among farming families and producers	Encourages on-farm diversification, rural revitalization and new business development
Minimal or zero usage of chemicals which in turn improves water quality, air quality and soil fertility	Improves occupational health and safety for farmers by reducing exposure to chemicals	Creates greater food security and lessens global market impacts caused by climatic disruptions, disease and diet trends

The global market has not been kind to agricultural communities or family farms. Yet part of the response to intensive livestock operations, corporate mega-farming – specifically, the growing interest in food security and sustainable agriculture – hold the potential to counter some of modern agriculture’s more destructive trends by enhancing sustainability and returning power to the small-scale producer. The models examined in this report are consistent with that trend.

4. METHODOLOGY

Appendix A provides a detailed methodology section

Overview

Field research was undertaken in southern Manitoba from the June to September, 2003 with former CSA data being collected in January 2004.

Main methodologies include reviews of relevant literature, key document review, case study interviews, key informant interviews developed through snowball sampling, and self administered and administered surveys.

CSA

Community Shared Agriculture research included key document review, key informant interviews, in person interviews, phone interviews, and self administered consumer surveys. In total 14 farmers on nine CSA farms were interviewed.

Consumer Questions

Self administered member surveys were conducted at only two CSA farms as a third farm was phasing CSA out of its operation. Results from a pre-existing phone survey provided data on an additional 63 members from a fourth CSA.

Table 4.1 CSA research summary

	Returned	Sent/ Conducted	Response Rate
In-Dept Current CSA interviews	4	4	100%
Former CSA Phone Interviews	5	7	71%
Farm #1 CSA surveys: Self administered	50	95	53%
Farm #3 surveys: Self-administered	18	20	90%
CSA Farm #2	63	Hemery et al, 2003	Unspecified

Research on the Humane Society Certified Meat program included key document review, and key informant and in depth interviews. The goal of the research was to determine the current scope of the program, perceived consumer demand, and barriers and opportunities.

Interviewees were identified from key document review, internet searches and snowball sampling. A local certifier, seven retailers, five restaurants, a meat broker, and program organisational staff were interviewed.

Farmers' Markets

Farmers' Market research included key informant interviews, phone interviews with Market coordinators or Market presidents, self administered vendor surveys, and

administered farmers' market consumer surveys.

Table 4.2 Farmers' market research summary

	Returned	Sent/ Conducted	Return Rate
Market coordinators: Administered In-depth phone interviews	21	21	100%
Vendor surveys: Self administered	119	278	43%
Consumer surveys: Administered	127	127	100%

5.0 RESULTS

Manitoba Community Shared Agriculture

Community Shared Agriculture first emerged in the 1960s in Europe and Asia (Cone and Kakaliouras, 1995, Imhoff, 1996). In 1965, Japanese mothers, concerned about the loss of arable land and increase in imported foods started the first CSA projects, called *teikei* in Japanese. Today Japan has over 600 producer-consumer partnerships supplying food to over 11 million people (University of Wisconsin, 2002). The first North American CSAs, formed in the mid-1980s, have spawned over 1,000 similar enterprises (University of Wisconsin, 2002).

CSA is a partnership between a farmer and consumers. Members of a CSA purchase a share (usually between \$200-\$500) in the farm's harvest prior to the growing season. In return members receive a portion of the farm's seasonal produce for between 12 and 20 weeks. This form of partnership guarantees farmers a market and allows the risks and benefits of farming to be shared between the farmer and the consumers.

CSA farms use organic and sometimes bio-dynamic principles and their organizational structures take many forms which may include family farms, worker or consumer coops, nonprofit organizations, or multi-farm CSAs. Shareholder involvement in their CSA is varied, ranging from subscription service CSAs with shareholders as "silent partners," to farms where members are involved in farm labour and the decision making process of the farm.

Dyck (1992) chronicles the development of CSAs on the Prairies. In November 1991 Manitoba farmers and interested individuals gathered for a series of five meetings to brainstorm ways of creating "an agri-food system that directly links the farmer with the consumer in an environmentally just way" (Wiens in Dyck 1994, p 234). The group developed the concept of "Shared Farming," a term coined by Dan Wiens, a farmer with a successful market-garden business.

Realizing their concept was similar to international models such as *teikei* in Japan and Community Supported Agriculture in the United States the group attended a CSA conference in Michigan. In February 1992 a newspaper article was published in the *Winnipeg Free Press* which resulted in over 200 applications for Shared Farming membership.

The Shared Farming model was featured in newspapers and articles across the province. Dyck (1994) states that through media attention and "proselytizing efforts" (p238) over 20 Shared Farms were initiated across the Prairies in one year. Dyck states that "the prairie experience ... inspired the creation of 10 farms in Ontario" (p244).

Shared Farming in Manitoba was born largely from the movement of a small number of individuals to develop production and food distribution strategies that would allow farmers to cope with and even redress the perceived resulting "stresses and shocks" of the global economy to rural (producer based) and urban (consumer based) livelihoods.

By 1995 there were approximately 12 CSA's operating in Southern Manitoba (Community Shared Agriculture Canada, 1995, Beeman and Rowley, 1994, Salm 1997). In 1997 Salm reported seven CSAs in Manitoba. As of 2003, three farms were fully operating as CSAs with a fourth farm phasing CSA out of the family farm. Only two farms have firm plans to offer shares in 2004. A third farm is looking for someone to

grow for existing CSA members while they take a year off.

In combination, the CSAs remaining in 2003 offered 363 shares ranging in price between \$260-\$325/full share. The CSAs provided fresh produce to a reported 1044 people for approximately 13 weeks per year. The farms offered seasonal employment to 11.5 individuals.

Producer Motivations

The motivations of four groups initiating CSAs are listed below. With the exception of Farm#2 (where CSA is the sole farm activity) CSA represented farm diversification. (Appendix A provides a profile of Manitoba CSA farms in 2003 and Appendix B outlines former Manitoba CSA farms)

The motivations of CSA farmers mirror those by Manitoba organic farmers identified in the 2002 Manitoba Organic Report by Wuerch, Urbina and Diachun (2002). The report states that although “organic farming is generating a very low income for the majority of producers in the province ... Financial gain is not the most important reason to engage in organic farming. The environment and personal beliefs are ranked one and two as the main reasons for going organic” (Wuerch, Urbina and Diachun, 2002).

Farm #1 (family farm)

Farmers from Farm #1 stated that

“[CSA] works well because I love the break from my office job ... it’s ideal. We love it. You couldn’t ask for a better situation really, to do what you love during the summer ... and have people involved and benefiting from it. We Shared Farm to build a form of agriculture that accounts for social, economic and environmental justice. We’re idealists, but we make money as well. We love gardening and want to nudge agriculture back to a more human form doing what we love.”

“We decided our share size almost exclusively on quality of life. You don’t want to be too busy. The other side of the coin is that you need enough shares to make the economics of it work out. So it’s a balance between quality of life and economics but you don’t go blindly into it ... it has to make sense for us too ... None of us are doing this just for the money. If we wanted to just make money there are a lot easier ways of doing it.”

“There’s a lot of this we enjoy and we believe in it. But we do try to do this so that it makes sense economically too ... Otherwise we can be all happy and flowery about these things but it’s only going to last a little while and then it’s going to die unless you are doing it in such a way that you can actually make a living at it. Otherwise it’s smoke and mirrors.”

Farm #2 (a workers coop for new Canadians)

The CSA was started to provide new Manitoban’s with fair wages for their agricultural products while providing sustainably produced local food (Villegas 2001).

Farm#3 (family farm)

Farmers from Farm#3 cite the desire to farm in an “ecologically sound, socially just and economically viable” manner and see CSA as a response to the current food system and the environmental and farm crisis (Kaktins 1997).

A farmer from Farm#3 states that

“We farm because we believe it’s important ... Even though money is certainly important to us, it’s not the main reason we do it. We could go and get part time jobs and earn a whole lot more money per hour than we do doing this ... never mind pension or health benefits. We do it to supplement our pension and ... socially it connects us with other people we wouldn’t otherwise connect with.”

Farm #4 (family farm)

When asked by Kaktins (1997) about her motivations for farming the main farmer from Farm #4 quotes Frank Lloyd Wright by stating that “the future of mankind is dependent on every human being intimately associated with half an acre of ground” and states that “we are for the earth and aim to pass it on to our children in as good or better condition as when we received it” (p141).

In an interview in 2003 she stated that the reason she started the CSA was that *“we were already farming organically ... I decided to stay home and still wanted to bring in income...I was interested in the educational aspect of city people reconnecting with the land and people were always finding their way out to our farm anyway so we just tried it.”*

Former CSA farmers

Of the five former CSA farms interviewed two began CSAs because they had excess produce while two began CSA farming specifically to diversify their farm incomes. One former CSA farmer began primarily for philosophical reasons. Kaktins (1997) indicates that a sixth CSA farmer began for similar reasons, which she listed as “providing seasonal organic food to consumers, address environmental concerns, preserving farmlands, improving the local economy, and educating others about farming and food production. Monetary gain was of low importance” (p136).

One CSA farmer that was interviewed stated that

“I’m sure there’s a lot of organic farms that make it because people have made the choice of saying “this is what we want, this is what we like,” therefore we stick to it and they’re not getting rich on it but they’re definitely making a living. I don’t know too many Organic farms that don’t have some kind of farm subsidy of sorts either if it’s selling land, or at least one of the two [partners] working out. And I mean that’s pretty much par for the course as far as conventional farming is concerned. You’ve got 75% of the farms in Manitoba that are being subsidized by outside income and that’s either one of the two people of the couple that are working. That’s a big percent. That’s Canada’s stats. I think it’s the whole farm sector that’s in crisis. Not just the organic [farmers].”

Gender Aspects

Tables 5.1 a and b illustrate the gendered aspects of labour on participating CSA farms. This information is based on interviews and participant observation. For the 12 current and former CSA farms five were female headed, two were male headed while four were joint headed by a male-female couple. One CSA involved board members of both genders with a male head farmer.

In Farms #1 and #3 the men in the family were interested in increasing the scale of the CSA while the women lobbied for decreasing the scale of the CSA and increasing family versus labour time.

The following quotes from the MF couple in Farm #4 illustrate the household dynamics for one CSA family (F corresponds to female response, M to male response).

F: What suffered during CSA is what happened [at home]. For us. Because I was so busy feeding everybody else that I didn't have time to do it properly at home.

M: Like putting away food for ourselves

F: Taking that time to get enough pickles and do enough tomatoes, can this and can that.

M: The [canning season] you have the most crop going out and that's when the baskets are fuller and yet that means more work for you. The other aspect of it was that she was getting less patient with the rest of us [family]. She took it out on us too. It's not that we suffered but it's still there.

Table 5.1 a Current CSA task breakdown by Gender

	Farm #1	Farm #2	Farm #3	Farm #4
Type of farm	Family farm	Workers co-op	Family farm	Family farm
Head	FM	N/A : Board with M head farmer	FM	F
Initiated	Male	Male	Male	Female
Scale	F scale back	N/A	F scale back	F scale back
Males	3 FT	2	1FT	1 PT
Females	1 FT 1 PT	Unknown	1 FT	1 FT
Male roles	Field work Share preparation	NA	Bookkeeping	Ploughing Livestock
Female roles	Bookkeeping	NA	Organic research	Produce & Customer

Table 5.1 b Gender of former CSA farmers

Farm	#5	#6	#7	#8	#9	#10	#11	#12
Head of Farm	F	M	M	F	F	FM	FM	F

CSA Consumers

It should be noted that consumer information for Farm #2 was obtained via a consumer survey conducted by Hemery, Kicenکو, Mardis, and Markovic (2003). Sixty-three member households of Farm #2 were contacted by telephone. Board members of Farm #2 were concerned about consumers being surveyed twice in one year, and so data from this telephone survey was used.

CSA Consumer Demographics

Consumers were asked to indicate gender, age, highest level of education, and gross household income range on a pre-coded survey.

Table 5.2a indicates that for all three farms the majority of respondents were female. Table 5.2b indicates that for Farms #1 and #3 the majority of respondents were between the ages of 26-45 while for Farm #2 the majority of respondents were between the ages of 31-50 (Table 5.2c). As previously indicated, survey information for Farm #2 was collected by Hemery et al. Therefore, some variable ranges may differ from those for Farms #1 and #3.

Table 5.2a Respondent Gender

	Farm#1		Farm #2		Farm#3	
	n	Percent	n	Percent	n	Percent
Female	31	68.9	49	77.8	11	68.8
Male	14	31.1	14	22.2	5	31.3
Total	45	100	63	100	16	100

Table 5.2b Consumer Age Range

Age range	Farm #1		Farm #3	
	n	Percent	n	Percent
16-25	3	6.3	0	0
26-35	16	33.3	1	6.3
36-45	16	33.3	9	56.3
46-55	6	12.5	4	25
56-65	5	10.4	0	0
66-75	1	2.1	2	12.5
Over 75	1	2.1	0	0.0
Total	48	100	16	100

Table 5.2c Consumer Age Range

Age range	Farm #2	
	n	Percent
15-30	7	11.1
31-40	20	31.7
41-50	20	31.7
51-60	8	12.7
Over 60	7	11.1
Total	62	98.4

Table 5.3 indicates that when asked to report education levels consumers from Farms #1 and #3 reported that the majority of respondents had either an undergraduate or postgraduate degree, 78.7 percent for Farm #1 and 62.5 percent for Farm #3.

Table 5.3 Consumer level of education

Education Level	Farm #1		Farm #3	
	n	Percent	n	Percent
Less than grade 12	0	0.0	1	6.3
High school	3	6.4	2	12.5
Some college /university	7	14.9	3	18.8
Undergraduate degree	20	42.6	7	43.8
Post graduate degree	17	36.2	3	18.8
Total	47	100	16	100

When asked about gross household income levels the largest single income category for both Farms #1 and #3 was over \$80,000, as illustrated in Table 5.4. Respondents from Farm #1 indicated a higher percentage (13.04 percent) of gross household incomes under \$20,000 while reported household incomes for Farm #3 began at \$40,000.

Table 5.4 Consumer Gross household income

Gross Household Income	Farm #1		Farm #3	
	n	Percent	n	Percent
Under 9,999	1	2.2	0	0.0
10-19,999	5	10.9	0	0.0
20-39,999	8	17.4	0	0.0
40-59,999	12	26.1	4	25.0
60-69,999	3	6.5	1	6.3
70-79,999	2	4.4	3	18.8
over 80,000	15	32.6	8	50.0
Total	46	100	16	100

Consumer Motivations

Members of Farms #1 and #3 were asked to rank their top five reasons (“No.1” being the most important) from a list that included “Get fresh produce,” “Cheaper way to purchase organic produce,” “Health reasons,” “Environmental concerns,” “Want to eat local produce,” “Want to support local farmer,” “Want to know local farmer,” “Want to know where/how food is grown, and “Want to share risk with farmers.” Predominantly ranked reasons of CSA members who responded to the survey are listed in Table 5.5 (see Appendix A).

Table 5.5 Farm #1 and #3 consumer motivations for joining a CSA

Rank	Farm#1 (n=50)	Percent	Farm#3 (n=18)	Percent
1	Get fresh produce	34.0	Get fresh produce	63.0
2	Want to eat local produce	26.0	Want to eat local produce	35.0
3	Support local farmer	19.0	Support local farmer/ Environmental concerns	22.0
4	Environmental concerns	23.0	Environmental concerns	24.0
5	Health reasons	17.0	Support local farmer	23.5

In a telephone interview conducted in 2003, Hemery et al (2003) asked CSA members of Farm #2, a workers co-op, their primary reason for joining the CSA. The responses of those members surveyed are listed in Table 5.6.

Table 5.6 Farm #2 Consumer motivations for joining a CSA

Farm#2 (n=63)	Percent
Support of new Canadians	22.2
Avoidance of chemical residues	14.3
Quality of food	12.7
Health	11.1
Social aspects of belonging to the Earthshare Co-operative	9.5
More than one	6.3
Protection of the environment	4.8
All of the above	15.9

Respondents were asked “What benefits do you feel you have gained as a member of the farm,” as an open ended question. Although some respondents indicated that they felt this question was similar to “Why are you a member of this farm” this question provided an opportunity for consumers to add benefits not included in the list of available responses. Tables 5.4a and b list consumer responses to the question.

Table 5.7a Reported Consumer Benefits from Farm #1
Multiple Responses

Benefit	n= 45	Percent
Veggies	14	17.9
Health	14	17.9
New food	9	11.5
Political	8	10.3
Local	8	10.3
Organics	7	8.9
Social	7	8.9
Convenience	6	7.7
Education	5	6.4
Total	78	100

Table 5.7b Reported Consumer Benefits from Farm #3
Multiple Responses

Benefit	n=9	Percent
Sense of community	4	44.4
Connect to co-op	4	22.2
Helps farmer	1	11.1
Recipes	1	11.1
Educate children	1	11.1
Total	9	100

Consumer Commitment to the Farm

Past and Future Membership

In order to determine consumer commitment to the CSA model and problematic aspects of CSAs, consumers were asked if they had previously been a member of another CSA farm, “How many years have you been a member of this farm,” and “do you plan to purchase a share next year ... Why or Why not?”

When asked, 10 percent (n=6) of survey respondents from Farm #1 indicated that they had been a member at another CSA farm. “Not enough diversity,” “Low quality,” “Other CSA stopped operating,” and “Generally unsatisfied” with other farm were given as reasons.

Table 5.8 illustrates the number of years CSA consumers have been members at their CSA farm. For Farm #1, 80 percent of CSA respondents have been members for less than two years while for Farm #3, 71 percent of respondents have been members for between three and five years while 21 percent have been members for over six years. Overall Farm #3 appears to have a larger member return population than Farm #1.

When asked, 73 percent (n=43) of survey respondents from Farm #1, 73 percent (n=46) of survey respondents from Farm #2, and 65 percent (n=15) of survey respondents

from Farm #3 indicated they would be purchasing a share in the following year. For those not returning “Too much food,” “Waste,” “Too much of the same thing,” “Going away,” and “Don’t like all vegetables” were listed as reasons.

Table 5.8 Years of Consumer Membership

Years	Farm #1		Farm #3	
	n	Percent	n	Percent
1	29	58.0	1	7.1
2	11	22.0	0	0.0
3	5	10.0	3	21.4
4	0	0.0	2	14.3
5	2	4.0	5	35.7
6	0	0.0	1	7.1
7	3	6.0	1	7.1
>7	0	0.0	1	7.1
Total	50	100	14	100

CSA Consumer Return Rates

CSA farmers were asked about consumer return rates from year to year. Farm #1 indicated an approximate return rate of 50 percent, Farm #2 indicated 30 percent and Farm #3 indicated they were not able to provide a number, but that they had a relatively high return rate.

Consumer Awareness of CSAs

Table 5.10 illustrates that when asked how they heard about the CSA farm, 79 percent (n=37) of respondent consumers from Farm #1, 52.4 percent (n=33) of respondents from Farm #2 and 87 percent (n=15) of consumers from Farm #3 reported hearing about the farm from friends, family members and neighbours.

Table 5.10 Average farm visits per year

# Visits to farm	Farm #1		Farm #3	
	n	Percent	n	Percent
0	26	52.0	14	78.0
1	9	18.0	1	6.0
2	1	2.0	0	0.0
3	2	4.0	0	0.0
4	1	2.0	1	6.0
5	1	2.0	0	0.0
6	0	0.0	1	6.0
7	1	2.0	0	0.0
8	1	2.0	1	6.0

For pickups	8	16.0	0	0.0
Total	50	100	18	100

Table 5.11 Way in which consumer first heard about CSA farm

Mode	Farm #1		Farm #3	
	n	Percent	n	Percent
Friend	30	63.8	12	70.6
Family member	4	8.5	2	11.8
Neighbour	3	6.4	1	5.9
Newspaper, TV, Radio	3	6.4	0	0.0
Doctor	0	0.0	1	5.9
Brochure	2	4.3	1	5.9
Farmer presentation	1	2.1	0	0.0
Mb econet	1	2.1	0	0.0
Self research	1	2.1	0	0.0
Organic farmers' market	1	2.1	0	0.0
Organic food guide	1	2.1	0	0.0
Total	47	100	17	100

Consumer Grocery Purchasing

Consumers were asked a variety of questions related to their grocery purchasing habits. These included questions related to produce purchasing to determine the role of CSAs in household produce availability, relationship to local food availability, and whether CSAs served to generate new organic consumers.

Consumers were asked, “If you weren’t a member of this farm how would you purchase your produce?” Among the sources indicated for Farm #1 (67 percent, n=47) and Farm #3 (43 percent, n=10) the majority of respondents indicated they would purchase their produce from grocery stores, whose sizes ranged from large scale chains to smaller enterprises. These sources appear to be the preferred method of purchasing over other direct marketing models such as farmers’ markets (Table 5.12). This corresponds to results from Farm #2 (Hemery et al, 2003). However, 43 percent of respondents from Farm #3 indicated that they would purchase their produce from farmers’ markets. The majority of respondents from both CSA Farms #1 and #3 indicate that in addition to being members of the CSA they also “Sometimes” purchase food from farmers’ markets (Table 5.13).

Table 5.12 Alternate household produce procurement

Mode	Farm #1		Farm #3	
	Responses	Percent	Responses	Percent
Grocery store	23	32.9	10	43.5
Large grocery store	18	25.8	0	0.0
Small grocery store	6	8.5	0	0.0

Total grocery store	47	67 percent	0	0.0
Local organic stores	9	12.9	0	0.0
Farmers' market	8	11.4	10	43.5
Garden	4	5.8	3	13.0
Food buying co-op	1	1.4	0	0.0
Other organic farmer	1	1.4	0	0.0
Total	70	100	23	100

Table 5.13 Frequency of shopping at Farmers' Markets

	Farm #1		Farm #3	
	n	Percent	n	Percent
Never	13	26.5	1	5.6
Sometimes	35	71.4	16	88.9
Regularly	1	2.0	1	5.6
Total	49	100	18	100

Table 5.14 lists the responses to the question “If you weren’t a member of this farm would you still purchase organic produce.” Respondent consumers indicated that almost one quarter to one third consume organic produce through the CSA that they would not otherwise purchase, and less than one quarter of respondents from both farms regularly purchase organic food products.

Table 5.14 Consumer purchases of organic produce away from the farm

	Farm #1		Farm #3	
	n	Percent	n	Percent
Yes	37	75.5	11	64.8
No	12	24.5	6	35.3
Total	49	100	17	100

Table 5.15 Frequency of purchasing organic food products outside of the CSA

	Farm #1		Farm #3	
	n	Percent	n	Percent
Never	6	12.0	4	22.2
Sometimes	32	64.0	12	66.7
Regularly	12	24.0	2	11.1
Total	50	100.0	18	100.0

Consumer Economics

Consumers were asked a variety of questions regarding the perceived economic value of their share, including the amount of vegetables received relative to household use, perceptions about price of share relative to purchasing vegetables, income farmers receive and willingness to pay more for their shares.

Overall almost all consumers from all three CSA farms indicate obtaining

sufficient or excess produce from their CSA (Table 5.16, Hemery et al, 2003). However, 38 percent of respondents from Farm #3 indicated that they felt that they paid more for their shares than they would for produce from the store. Almost two-thirds of respondent members from Farm #1 indicated that the price of their share is cheaper than purchasing their produce at the store, and 87 percent of respondent members of Farm #2 reported being satisfied or very satisfied with the price of their shares, while 59 percent (n=37) reported the overall value from their share as good or excellent (ibid).

Table 5.16 Perceptions of the amount of produce from a CSA share

Quantity	Farm #1		Farm #3	
	n	Percent	N	Percent
Not enough	0	0.0	1	5.9
Just right	27	54.0	14	82.4
Too much	23	46.0	2	11.8
Total	50	100	17	100

Table 5.17 Cost of CSA share relative to produce purchased from the store

Relative Cost	Farm #1		Farm #3	
	n	Percent	n	Percent
Cheaper	32	65.3	5.0	31.3
The same	11	22.5	5.0	31.3
More than	3	6.1	6.0	37.5
Unsure	3	6.1	0.0	0.0
Total	49	100.0	16.0	100.0

When asked “Do you feel your farmer receives a fair income from the memberships” many respondents indicated that although they “hoped so”, they were not certain of the economics involved. Approximately one quarter of respondent members from Farms #1 and #3 indicated that they were aware of the challenges associated with returns to labour (Table 5.18, 5.19).

Table 5.18 Fair farmer income from CSA memberships

Response	Farm #1		Farm #3	
	N	Percent	n	Percent
Yes	19	33.9	5	41.7
No	4	7.1	2	16.7
Don't know	33	58.9	5	41.7

Table 5.19 Comments on “fair income”

Responses	Farm #1		Farm #3	
	n	Percent	n	Percent
Don't know	4	13.3	5	41.7
Hope so	13	43.3	4	33.3
Doesn't pay labour	8	26.7	3	25.0
Farmers would pay fair wages to employees	3	10.0	0	0.0
Short growing season - difficult	1	3.3	0	0.0
Less expenses when direct marketing	1	3.3	0	0.0
Total	30	100	12	100

As shown in Tables 5.20 and 5.21, over half of the consumers from Farm #1 were willing to pay more for their shares, while 56 percent of consumers from Farm #3 were unsure, unable, or unwilling to pay more for their shares. One quarter of respondents from Farm #1 indicated being willing to pay an additional \$50 (n=5) for their share. The majority of participants from Farm #3 chose not to respond to that question.

Sixty-two percent (n=39) of respondent members from Farm #2 indicated that they would be neutral or agreeable to a 5-10 percent increase in share prices, while 30 percent (n=19) and 38 percent (n=24) of respondents indicate they were willing to pay a price premium over conventional food prices of up to 10 percent and up to 20 percent respectively (ibid). More respondents indicated that they found an increase in share price to be agreeable (51 percent, n=32) than volunteering (40 percent, n=25) at the co-op for one day per growing season (ibid). Overall the majority of consumers from Farms #1 and #2, and 44 percent of consumers from Farm #3 would pay additional costs for their CSA membership.

Table 5.20 Willingness to pay more for a CSA share

	Farm #1		Farm #3	
	N	Percent	n	Percent
Yes	24	51.1	7	43.8
No	20	42.6	6	37.5
Not sure	3	6.4	3	18.8
Total	47	100	16	100

Table 5.21 Consumer willingness to pay a higher share price

	Farm #1		Farm #3	
	n	Percent	n	Percent
\$10	1	5.3	1	50.0
\$25	3	15.8	0	0.0
\$35	1	5.3	0	0.0

\$38	3	15.8	0	0.0
\$50	5	26.3	1	50.0
\$75	4	21.1	0	0.0
\$100	1	5.3	0	0.0
\$300	1	5.3	0	0.0
Total	19	100	2	100

Suggestions for CSA improvement

Table 5.22 identifies consumer responses to the question of “What would improve your membership in the farm.” The desire for increased choice from Farm #1 and #3 corresponded to Farm #2 respondents desire for increased variety, where 26 percent (n=17) of respondents indicated being dissatisfied with the variety of produce offered by the CSA.

Table 5.22 What would improve the CSA

Areas for improvement	Farm #1		Farm #3	
	N	Percent	n	Percent
More choice	12	38.8	1	50.0
Split shares small families	3	9.7	0	0.0
More fruits/berries	2	6.5	1	50.0
Year round	2	6.5	0	0.0
Like to participate more	2	6.5	0	0.0
Know what produce is coming	2	6.5	0	0.0
More flexible/closer pick-ups	2	6.5	0	0.0
Eggs	1	3.2	0	0.0
Work for discount	1	3.2	0	0.0
Variety spread out	1	3.2	0	0.0
More organic products	1	3.2	0	0.0
Shared dehydrators	1	3.2	0	0.0
Social events at farm	1	3.2	0	0.0
Total	31	100	2	100

The home-based and comparatively small-scale approach to CSA has meant that Manitoba farmers’ have not had to go outside existing home facilities for processing space and transportation. When compared to average conventional family farms the decreased emphasis on mechanization and increased reliance on labour by small scale organics have results in low dependency on physical assets.

However CSA farmers indicated that the low financial returns from CSA can sometimes result in limited acquisition of physical inputs. The non profit status of Farm

#2 allowed it to acquire a grant to procure greenhouse materials, a tractor, and irrigation equipment it would otherwise not have been able to afford.

Transportation costs were cited as barriers for Farm #2 and Farm #4. Farm #2 plans to relocate at least part of the farming activity closer to the majority of sharers. Farm #1 has plans to develop a commercial kitchen on their property for additional food processing.

The homes, greenhouses, and gardens of two former CSA farmers were destroyed in the 1997 Red River valley flood. In the aftermath both farmers were forced to relocate to land with poor quality soil. The loss of physical and natural assets resulted in these farmers discontinuing two CSAs.

Labour

In terms of diversifying labour at the household level of the four operating CSAs one farm had both heads of the household working part time off farm, in another both farmers were retired, in the workers coop the head farmer had an off season job, and in the farm phasing out of CSA the spouse of the farmer had a full time off farm job. Of the five former CSAs interviewed three were full time farmers while two others had spouses who worked off farm. A sixth CSA was a full time farmer with a spouse working off farm (Kaktins, 1997).

Required Labour for the CSA model

Participant observation revealed that direct marketing and the removal of intermediaries result in the diversification of skills for a CSA farmer. A farmer turned CSA becomes manager, marketer, producer, processor, packager, retailer, distributor, delivery driver, public relations and volunteer coordinator, accountant, and educator.

All four currently operating CSAs utilize labour outside the family while former CSAs reported no labour external to self and family at the time of operation. The largest two operating CSAs (Farm#1 and Farm#2) have full time apprentices and hired farm workers while farms#3 and #4 have volunteers through the Willing Workers On Organic Farms program (WWOOF) and other youth volunteers. In addition to diversification of labour the CSA model increases the volume of labour for production.

Current Manitoba CSA farmers indicated crop diversity, succession planting, diversified harvesting, seed saving, consumer expectations of bug and dirt free produce and associated labour, and research and techniques required for organic production as sources for increased labour requirements.

Of the five former CSA farmers interviewed three indicated high drains to available labour, and low levels of consumer participation as contributing factors to discontinuing CSA farming. A sixth CSA farmer interviewed by Kaktins (1997) expressed similar sentiments.

As the main farmer from Farm #4 stated

“It seemed like I was giving more than I was receiving ... It seemed like the more I gave the more they wanted ... It is definitely burnout. Every waking moment is to feed other people.”

A former CSA farmer indicated that *“CSA didn’t work out too well for us ... people didn’t come out and help and we got swamped with work ... we were not able to*

make a living and we gave out more than we got back.”

However a farmer from Farm#1 stated that

“any kind of market garden is a lot of work, I think CSAs are less work. You can regiment yourself better with CSA ... it’s a great thing for us because it is an assured market and the money up front. There is a lot of work that we put into any pound of produce, it’s less in Shared Farming then it would be otherwise because it is all assured and it is paid for in advance. So in the end I think economically it makes a lot of sense, all the sense for us. We pick what we know we’re going to need and we deliver it and that’s the end.”

Volunteer Labour

Although CSA farms appear to draw more heavily on human labour than do other models the concept of shareholder involvement for both educational and logistical purposes is central to the concept of CSA.

In Manitoba former and current CSAs attempting to include working shares (members receive discounted or free memberships in exchange for farm labour) have met with little success. Aside from one or two special arrangements farmers have had no successful regular working sharers and report difficulty encouraging members to visit the farm outside of annual potlucks or u-picks.

Farm#1 has members who pick up their shares from the farm in return for a discounted membership. Of the members of Farm#1 who responded to the survey, 52 percent of indicated that they had never visited the farm while 15 percent had visited at least once.

Farm#3 has youth volunteers and three regular member volunteers who come out weekly to assist in the packing of boxes and other farm tasks. Of the members of Farm #3 who responded to the survey 78 percent indicated that they had not visited the farm that year. Two former CSAs had members who occasionally visited but whose labour was not factored into planning of the running of the farm.

With the exception of Farm #2, the workers coop, all current and former Manitoba CSA farms interviewed mentioned increasing age and decreasing physical ability as a challenge in their ability to operate a CSA. In addition Farms #1, Farm #4, and three former CSAs indicated decreased access to family labour as a challenge.

Location of farm in proximity to market appeared to decrease drains to labour in the form of transportation and volunteers, while increased farm visits by members also assist in the development of social capital.

Economics

Cited economic benefits of the CSA model include the provision of a “fixed market” which renders farmers less vulnerable to decreasing demand and seasonal market prices, and prepayment of shares, decreasing the reliance on external financing for operating capital (Sabih and Baker 2000). Although not all farmers take advantage of the risk sharing aspect of CSA, the concept of sharing the harvest, bounty or crop failure, can assist farmers operating under increasingly fluctuating weather conditions.

CSAs have the potential to increase farmers’ economic asset options. As Robin Van En (1995), one of the founders of the CSA movement in North America, states, “the

CSA system also gives farmers financial credibility; I know that the CSA guaranteed income helped me get my farm mortgage. When lenders see that people are willing to take this risk with farmers, they begin to take more risks and try alternatives”.

However, in an interview, Baker (Comeau, 1999) states "I would say that organic farmers are motivated by emotion rather than economics -- the economics tends to fall to the bottom of the list. Often, these people are subsidizing their farms through other income, although some may not realize just how much they are, in fact, subsidizing it."

The Manitoba farmers that have chosen to discontinue utilizing the CSA model cite economic and human capital reasons. Three of the five former CSAs found that the financial returns to labour were too low and that they were not able to meet their financial needs. Two of these were full time farmer's who entered into CSA primarily for increasing their financial asset base. One farmer stated that “the farm was my sole source of income and between the customers attitude and my labour I was going broke so I sold my property.” While the other simply stated that it “wasn't worth our while.”

In addition to drains on labour the farmer from Farm#4 is discontinuing the CSA due to not only insufficient financial returns but actual drains on financial assets. She explains that “I remember from our accountant I had given him just the hours that I had kept track of and that was just when I was in the greenhouse, ... the hours that I was in the garden, well, I forgot about all that stuff. I didn't write down all my hours. So just with the spring hours he figured I made 65 cent an hour. So that means I must have went way below that because I didn't count my hours in July, August and September. Insane ... You don't do it strictly for the money but you have to make something to survive. When you went over the books [my husband's] wages off farm were subsidizing us feeding those families in the city. You could see it directly.”

Increased scale appears to increase opportunities to develop the finances to hire off-farm labour, however despite the large numbers of potential members, choice and quality of life appear to be weighted highly by farmers when determining their membership size. As one CSA farmer stated “We could actually do 200 shares on this farm with the amount of land we have. We don't just do it just because we can. It's based on what kind of life we want to live. We base it on that.”

Given the high priority placed on choice and quality of life it appears that in order for Manitoba CSA farmer's to make a “fair” wage with a small scale CSA they would have to charge a higher share price. However, among CSA farmers concerns regarding equity and distribution of their products rank highly as a barrier to the establishment of sustainable pricing.

Most Manitoba CSA farmers have found that the CSA model provides low levels of financial return and in some cases that the model drains financial and human assets from other livelihood strategies. Despite highly valuing social and natural capital assets the majority have found the drains on financial capital too high.

Farms #1, #2, and #3 continue to utilize the CSA model. Farm#1 operates at a sufficient scale to allow them to hire 2.5 additional farmers. Both heads of the household in Farm#1 have alternative sources of income. After paying salaries to all 4.5 farmers and accounting for all costs including depreciation the CSA had \$2,500 profit.

Farm #2 is a registered nonprofit workers coop and can apply for grants. It operates at the largest scale of any CSA farm in the province. Despite this, in 2002 the farm made a net loss of \$21,000 after paying all salaries.

Farm #3 operates at a scale whereby they have sufficient human capital available within their household and through volunteer labour. Both farmers are retired and so depend on the CSA for a small percentage of their household income. The CSA nets \$3800 in profit before paying the farmers a salary.

Challenges with the CSA model

Several challenges associated with the CSA model are apparent from the research. Former CSA farmers identified challenges such as low levels and seasonality of income, transportation, and higher labour inputs than other forms of marketing. Challenges with consumers included unwillingness to contribute labour to the CSA, expectations of immaculate produce, greater variety and longer availability of produce, and lack of appreciation for the philosophical underpinnings of the CSA model.

In summary, an analysis of the CSA model reveals that the use of the model as a household livelihood diversification strategy as well as the pre-paid risk-sharing aspects of consumer membership provide evidence of risk alleviation strategies of participating rural producer households. The element of livelihood choice appears to be a key element in producer household decisions to include the CSA model in livelihood strategies. An examination of producer motivations also reveals elements of the informal economy at work with producers' goals of household sustainability side by side with those of developing community bonds and resource planning with an eye for intergenerational stewardship. In addition, both producers and consumers are participating in instrumental market behaviour by looking outside conventional market relations to include such aspects as moral motivation, ethical choice, trust, and the development of bonding social capital. While the socio-cultural aspects of the model are valid they appear to threaten the financial and human capital assets, bringing into question the sustainable aspects of CSAs as a livelihood strategy in Manitoba.

Conclusions

While CSAs are not widely prevalent in North America they do represent a livelihood strategy adopted by households concerned about the current state of the environment and our food supply. The CSA model does not provide a simple solution to economic, social or environmental challenges as has been shown by the relatively limited growth of this model in North America. CSA represents a niche in the field of Civic Agriculture and is only one of many options available to farm families.

The history of Shared Farming in Manitoba is in contrast to the experience of the model in other provinces such as Quebec, where the CSA movement has expanded from 7 farms feeding an estimated 250 households to over 69 farms (Joncas, 2004). In a survey of Michigan CSAs, DeLind (2002) identified thirty-two CSAs and cites a "three-fold increase in four years."

In Canada, there have been several attempts to form national CSA organisations including the now defunct CSA Resource Centre, launched in 1994, based out of the Ecological Farmers Association in Wroxeter, Ontario (Cleary, 1994). Although there is limited research on CSAs in Québec it appears as though there is an active and vibrant unified movement in this part of Canada. In 2000, Equiterre coordinated the first national conference on Community Supported Agriculture which had over 200 attendees (Equiterre, 2000).

In 1995, the Quebec CSA Network was also launched by the Ecological Agriculture branch of Équiterre. The CSA model is referred to as “l’Agriculture soutenue par la communauté” or (ASC). By 1998, it had grown to include 27 member farms serving 1300 shares at 50 drop-off points. In 2004, ÉquiTerre reports 69 member CSA farms (Joncas, 2004). Additional research on Quebec CSAs may reveal the cause of this success.

Based on these findings it appears that for nine farms the CSA model in Manitoba has not proven to contribute to a sustainable rural livelihood over the long term. Scoones (1998) identifies the five key elements of a sustainable livelihood activity as the creation of working days, poverty reduction, increase in well-being and capabilities (which go beyond material needs to include security, happiness, and self-esteem), a decrease in the vulnerability of a livelihood, and the sustainability of the natural resources base. For the remaining three Shared Farms in Manitoba overall the CSA model appears to sufficiently meet their personal requirements to warrant its continued use as a livelihood activity.

While in its current form the CSA model presents significant economic sustainability barriers to its practice in Manitoba. As a suggestion for further research and practice, the risk-sharing elements of the model could possibly be applied successfully for products with a longer storage life such as root crops and meat.

Humane Society Certified Labelling Program

The Humane Society Certified (HSC) Labeling Program was established in the spring of 2002 and provides certification and labeling for meat produced in accordance with animal welfare organization standards. This program was the first of its kind in Canada although the BC SPCA launched a similar program in the winter of 2002.

In her presentation, “Animal Welfare in Agriculture . . . What Will Customers Demand,” Jeanne Cruikshank of the Canadian Council of Grocery Distributors (2003) outlined existing legislation intended to address animal welfare which includes the Criminal Code of Canada, the federal Health of Animals Act, and federal and provincial Meat Inspection Acts. In addition there are the Recommended Codes of Practice for the Care and Handling of Farm Animals. While these codes provide useful guidelines for livestock production and transport, they provide “recommendations” (Canadian Agri-Food Research Council. 2004) rather than enforcing minimum standards. Steven Huddart (1999) states that “by focusing on conventional containment systems the recommended codes of practice for the care and handling of farm animals tend to support the status quo without generating incentives or recognition for enhancements to animal welfare.” Currently there are no inspectors enforcing the recommended codes of practice and existing animal welfare legislation is not called into play unless a breach of animal welfare is reported or observed.

Meat that is Winnipeg Humane Society (WHS) certified has been produced at farms that have been inspected by an independent trained certifier. Certifying costs between \$150 and 175 per year and farmers receive a 10 percent price premium for certified meat.

The WHS standards include:

- no hormones or unnecessary antibiotics in feed (ie, antibiotics can be administered when the animal is sick but not as growth promoters);
- no animal by-products in feed;
- prohibition of the caging of animals for prolonged periods of time;
- mandatory space allowances;
- natural flooring and light; and,
- mandatory inspection by a WHS trained certifier.

Interviews with program co-ordinators, key retailers, meat brokers, local chefs and grocery stores in Manitoba identified the following activity with the Human Society Labeling Program.

Current Sales

At present (fall 2003) two stores, Harry’s and Friggs Natural Meats, continue to carry HSC meat, mainly beef or turkey/chicken, however, none are selling the meat with the HSC sticker. Two restaurants, Bread and Circuses, Fusion Grill (in addition to the now-defunct Urban Ojas), purchased meat directly from HSC-certified producers. The restaurants carry the meat, as they believe it is a superior product and are ideologically committed to the concept. However they do not advertise their products as HSC certified, not all meat served at these restaurants is HCS certified, and they do not want to enter into a discussion on the ethics of animal husbandry with their customers.

Consumer Demand

Overall the sense from grocery stores, meat stores, and restaurants is that currently consumers are more interested in purchasing a “natural” or organic meat that is raised without hormones and antibiotics than they are in a product that is labeled as “humane.” The need for a broad-scale consumer education program has been identified.

Meat Broker

For the majority of the time that the program has been operating there has not been a meat broker and so sales to retail stores have been low. The original meat broker for HSC meat Helen Bouvier, indicated that the current scale of consumer demand in the province means that there is a market for specific or prime cuts but at present the market has not developed sufficiently to allow for demand of the remaining cuts. For example, a high end grocery store/deli is interested in pork loins and would order 20 carcasses’ worth a week; however, that means the rest of the carcass has to have a market. There is currently insufficient demand for these meat products, leaving her with unsold remaining cuts which results in insufficient profit for her to continue marketing beef and pork.

A recent conversation with Helen Bouvier indicates that currently she is only selling turkey in Manitoba using the HSC label. At present the label is not approved for use outside of Manitoba and so poultry for export has to be certified under an American standard, the U.S. Humane Certified Raised & Handled Label. She indicates that she will use the label once it is approved for use outside Manitoba.

Producers

The lack of a meat broker has resulted in producers directly marketing whole or half animals. This has tended to be too large a size for most restaurants and individuals. Stakeholders identified that for the program to be a success a large retail store to come in to make up the economies of scale.

Friggs Meats

This Winnipeg-based store pays more for HSC meat but absorbs the cost and doesn’t charge the consumer a premium. This is due to the store’s perception that although some consumers would pay an additional cost for certified meat they would not pay enough or purchase enough to sell large volumes. The store indicated that they do not carry HSC pork at present due to the high price.

Harry’s Foods

Harry’s Foods states that two to three percent of meat sales come from HSC beef. They indicate that there is increased customer demand for naturally produced meat, however it is not anticipated that demand will exceed 1.5 times maximum sales unless large issues with mainstream meat occur. The manager stated that at present the “Natural” and organic standards are higher than the HSC standards.

Restaurants

Of the five chefs/restaurants that purchase HSC meat:

Former purchasers

One restaurant was originally interested in purchasing HSC lamb and individual portion sized chickens (would pay the equivalent price of a large size chicken), but he has been unable to find suppliers. The chef states that his priority is to buy local and that a lot of Manitoba beef is raised without hormones and antibiotics but isn't certified as organic, and instead it is called "natural."

One restaurant began purchasing HSC meat at the suggestion of their chef. The dish was marketed as HSC-certified on the menu however it was not in high demand and the additional cost to the restaurant didn't make it advantageous to continue carrying it.

Current purchasers

One restaurant purchases 150-200 kgs of turkey weekly from a meat broker, however the owner does not advertise the product as HSC certified. The owner cites ideological reasons for purchasing the HSC turkey and indicates that the meat has excellent flavour. He notes that the turkey sandwiches made from free-range turkey are the restaurant's best-selling item.

One restaurant occasionally purchases HSC beef when the price is good and it is available. Meat is bought through a meat broker or directly from a farmer.

One chef purchases HSC meat directly from the producer. He believes that the product is of higher quality. He doesn't advertise the product as "humane." Through a contracted butcher the chef buys cuts of meat from the producer, which is easier to cost than buying the whole animal, and then rotates primary cuts with secondary cuts, e.g. tenderloin then ribeye then sirloin, on the restaurant's menu.

The chef states he is trying to help out the producer by using the other parts of the animal. The chef is also developing additional cuts and is attempting to bring certain cuts back, such as the flat iron steak.

He states the HSC is a great lobby group and the product is good, however he feels that the meat shouldn't be marketed as HSC, it should be marketed as grass-fed at the same price. He doesn't want to remind meat restaurant patrons of the slaughter. The chef states that he would like the WHS to work with the beef industry and lobby for pasture slaughter instead of shipping animals to slaughterhouses. The animal is less stressed at the slaughter and because of this doesn't release as many natural hormones into the meat. The end product is higher-quality meat that has had a less stressful (i.e. more humanely) slaughter.

Barriers

Both conventional commercial and organic producers appear to have been affronted by the label of a "humane" standard, with both rejecting the implication that their animals were reared inhumanely. Large corporate meat producers appear to have felt threatened by the HSC program. There are reports from three sources suggesting that retailers and restaurants were warned that if they carried the HSC meat they would not receive supplies of other meats from commercial packers.

In 2002, Howard Hilstrom, then a Canadian Alliance MP from Manitoba, called

humane labeling confusing to consumers. He said special labels imply consumers need to be protected from antibiotics and hormones and that the approved meat is safer. "The biggest problem is that it tends to turn urban Canadians suspicious of how our livestock are raised in the countryside." Hilstrom added that, "There's no truth to the fact that there's inhumane treatment of animals or that our food supply is unsafe."(CBC News Online, 2002).

In addition, the Federal government has indicated that it won't allow the HSC label to slaughter in their slaughterhouses as it feels the HSC label implies that other producers are inhumanely marketing their produce. Meat intended for export outside the province must be slaughtered in a federally certified slaughterhouse, as meat from provincially certified slaughterhouses can't be sold inter-provincially.

Discussion

The Leopold Center for Sustainable for Agriculture (2003) defines an eco-label as a seal or logo indicating that a product has met a certain set of environmental and/or social standards or attributes. An eco-label provides an effective vehicle for consumer education regarding agricultural production practices.

Examples of production related agricultural labels include the Free Farmed logo adopted by the American Humane Association, The Food Alliance program originating from the state of Washington, and the Demeter Certified Biodynamic program originally developed in Austria in 1928 (Consumers Union, 2002).

Recently the Canadian Organic Livestock Association qualified for the use of the Free Farmed logo (Alberta Cattle Feeders' Association, 2002). Organic certification of agricultural products indicates the use of organic production methods specific to the certifying body. For example, the Organic Producers of Manitoba, a Manitoba certifying agency hires independent organic inspectors to assess farms and processing plants for their compliance with organic standards. Over forty-five certifying bodies exist in Canada (Wuerch et al, 2002).

Current food eco-label programs fall into three broad categories: organic, pesticide residue claim-based, and sustainable or eco-friendly production systems (Benbrook, 2003). By Benbrook's classification, the HSC program would be considered as a sustainable production system, with the added emphasis on social justice (or production based on inspected compliance with animal welfare standards).

The U.S. Consumers Union (2003) developed a guide for the evaluation of the effectiveness of environmental labels. They suggest that the following criteria are required to make an eco-label effective:

- meaningful and verifiable;
- consistent and clear;
- transparent;
- independent and protected from conflict of interest; and,
- provides opportunities for public input.

The HSC program appears to meet the first three criteria, but may have fallen short on the last two. It became apparent that the WHS's involvement with the lobby group Hog Watch Manitoba may have jeopardized the perceived independence of the intent of the program. This hostility was registered not only by the reported threats to

restaurants and retailers contemplating the purchase of HSC meat, but was present from the initial design of the program. The fifth criterion stresses the importance of public involvement in the design of the certification program, which according to the Consumers Union should include consumers, environmentalists, social representatives and industry. From the outset, industry representatives provided minimal support to the program and were subsequently hostile. The same can be said of government, as support, while it was never directly sought from the Manitoba Agriculture and Food, it was evident that Manitoba Agriculture was not supportive of the program (per com Burns, 2004).

The HSC program did not reach the required threshold in the marketplace to make it economically viable. However, the Manitoba experience does not imply that, as a model, humane labeling programs should be further explored. Established programs in other parts of the world are growing in consumer acceptance (Freedom Farm in Great Britain, Free Farmed in the US). These programs have desirable attributes as they promote sustainable production systems and are “... a continual step towards organic agriculture” (per com Gibson, 2004). Human farming practices offer producers techniques to make environmental improvements on-farm by composting animal wastes (thereby treating pathogens and limiting the contamination of surface and groundwater) and eliminating the use of hormones, growth promoters and sub-therapeutic antibiotics.

A recent investigation carried out by the Leopold Center for Sustainable Agriculture (2003) gauged the understanding and perceptions of consumers and food businesses regarding eco-labels and local foods. Their analysis did not include a “humane” farming label, however “grown organic” was included within the scope of the study. Their results indicate three quarters (75 percent) of consumers surveyed and over half (55 percent) of food businesses surveyed chose “grown locally by family farmers” as their first choice for produce or meat products. Their findings suggest that locally grown food combined with a connection to family farms (a term associated with small-scale enterprises) provides a powerful marketing tool, surpassing even “grown locally-organically,” which received the second highest percentage of first choice selections (Leopold Center for Sustainable Agriculture, 2003). Recent scares in the meat industry may also explain increased consumer awareness and an understanding of the vulnerability of export-based agriculture.

Key informant interviews conducted with meat retailers during this study indicate consumer preferences for “natural” meat products raised without synthetic hormones and feed additives such as antibiotics and animal by-products. While “natural” meat is generally defined or perceived to include “pasture-raised,” “grass-fed” or “free-ranged,” (Leopold Center for Sustainable Agriculture, 2002) this term is used loosely by many food producers and/or retailers. Meat labeled “natural” does not necessarily mean that the animal spent its entire life on pasture; it could merely have been finished on a grain diet for the last couple of months before its slaughter.

The US ban on Canadian beef, lamb and bison has resulted in a glut of meat intended for export and a subsequent decline in price. Although farm cash receipts for meat prices have plummeted, retail prices have remained constant. In addition the inability of many farmers to continue to feed animals that were originally intended for market has resulted in high volumes of animals waiting to be slaughtered at abattoirs. These factors have resulted in farmers turning their attention to the local market, the

establishment of cooperative slaughterhouses, and direct sales. In addition, the use of strategic labeling such as eco-labels, can potentially provide opportunities for product differentiation and marketing.

One of the major drawbacks of a “natural” product, however, is that it does not have a defined standard. Coupled with the fact that there is no third party certification and on-farm inspection, as there are in organic and humane production systems, there is no way that a retailer or consumer can verify a claim. As the Agricultural Marketing Service of the United States Department of Agriculture (2002) states “*Natural* and *organic* are not interchangeable. Other truthful claims, such as free-range, hormone-free, and natural, can still appear on food labels. However, it is important that these terms do not get confused with ‘organic.’ Only food labeled ‘organic’ has been certified as meeting USDA organic standards.”

Manitoba Farmers' Markets

Manitoba Provincial Farmers' Marketing Association

In the mid-1980s the Manitoba Department of Industry Trade and Mines initiated the Manitoba Provincial Farmers' Marketing Association with the goal of developing a critical mass of farmers' markets in Manitoba (Willard, 2003). While motivations for initiating this project were not revealed during interviews, it may be that this project was initiated as a state intervention in an attempt to provide livelihood diversification strategies to interested rural residents.

Borrowing from the Saskatchewan model, Dale Willard, a former public employee with Industry, Trade, and Tourism, established a start-up package for new markets which included a \$500 start-up grant, recommendations for the use of test markets, and guidelines for identifying location and market hours. In addition, the association organised annual conferences and collaborated with market associations in the United States and Mexico. At its peak the organisation had 34 registered markets with reported sales of \$500,000 annually.

Although the initiative for the organisation came from the Department of Industry, Trade, and Tourism, the Farmers' Marketing Association had no direct affiliation with the provincial government. Markets were established as independent cooperatives with common practices and legislation, each having their own Market Coordinator and a steering committee. Markets reported earnings and vendor numbers to the provincial association for documentation purposes. The Association provided a platform from which to lobby for signage allowances with the highways department and assisted in the negotiation of Public Health Agreements for market guidelines and permission for new products. Manitoba farmers' markets were limited by the health department as to the number of days they can vend, making them seasonal in nature with the addition of a Mothers' Day and a Christmas sale. Willard indicated that the main reason for this limit is economics, for example not wanting to put local bakeries out of business; however, he indicated that the limited number of market days was not a problem for vendors who were generally satisfied with the length of the vending season (2003).

The Marketing Association's operating principles and health codes were subsequently applied to all markets whether they were members of the association or not. A key principle was the "make it-bake it-or grow it" policy.

The Manitoba Provincial Farmers' Marketing Association operated until the late 1990s when member burnout, organisational shifting between government departments, and the merger of the Farmers' Market Association annual conference with the Provincial Fruit Growers Association removed the perceived need for a formal organisation. Association records were disposed of one year after the disbanding of the association.

Market Demographics

The study included all 19 markets listed with Manitoba Agriculture and Food as well as the Deloraine farmers' market and the new Cypress River farmers' market. Through the course of the study the research team became aware of several other new and ongoing markets in Manitoba. New markets in 2003 included the Riverbank

Farmers' Market in Brandon, the Prairie Sun Organics Market at the Red River Exhibition grounds in Winnipeg, and the Exchange District Market Revival and Arts Festival, Winnipeg. Other municipalities with markets not listed with Manitoba Agriculture included Selkirk, Clear Lake, and Boissevain. In total there were 27 known markets in Manitoba, the majority in rural communities, with 21 markets serving a conservatively estimated total of 10,000 consumers per week.

Overall market venter numbers tend to be low, especially for rural markets. Figure 5.1 illustrates the market size by number of vendors for 21 markets. It can be seen that half of the markets have less than 10 vendors while only 2 markets reported vendor numbers greater than 30.

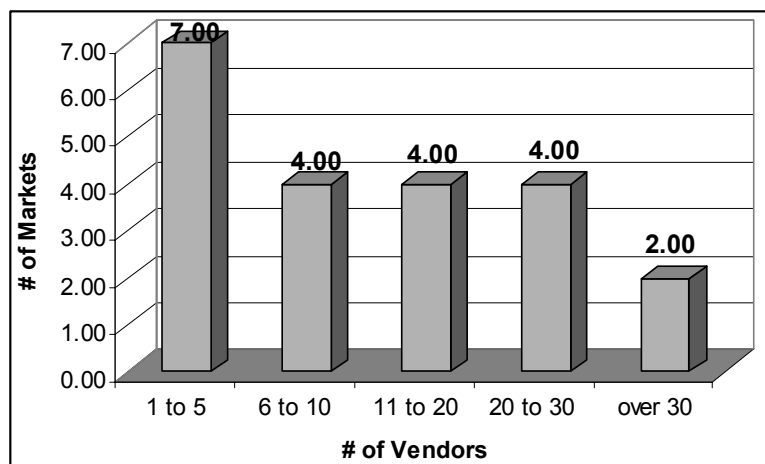


Figure 5.1 Number of markets with varying vendor size

Market coordinators were asked to rank the stage of their markets and customer attendance as developing/growing, steady, or declining. Figure 5.2 reveals that when rural and urban markets are combined, customer numbers appear to be generally steady or increasing while vendor numbers are mainly growing or declining. When rural and urban markets are analyzed separately 60 percent (n=17) of rural markets report declining vendor numbers.

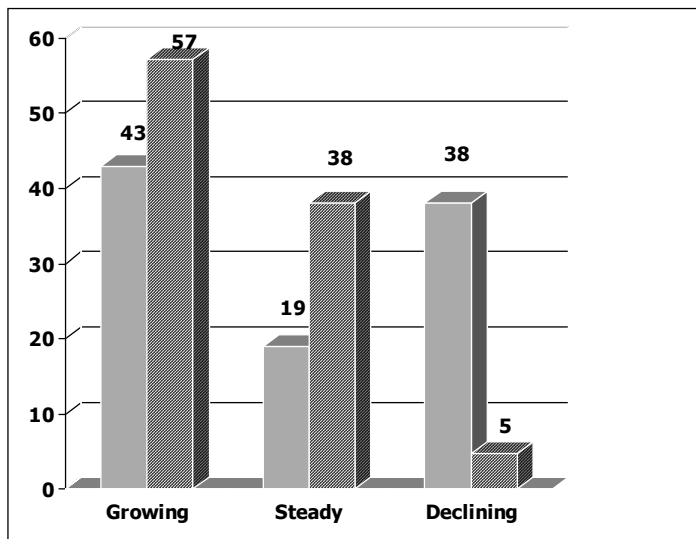


Figure 5.2 Stage of Market Development

Reasons for declining vendor numbers given by market coordinators include: aging rural populations and a “lack of young people”; the perception of farmers market vending as “middle-aged”; a negative view of manual labour; the view of market entrepreneurship as demeaning; and, a rural workforce with less free time as heads of households are increasingly employed outside of the home or farm. Market coordinators also indicated lack of means to contact vendors as a barrier.

When asked if they saw themselves direct marketing in 1, 3 or 5 years, 44 percent of vendors indicated that they would still be marketing in five years, a result that suggests Manitoba could lose more than half of its existing vendors over the next five years.

Lee Friesen Alford, Manitoba Home Economist at Swan River, indicates that there is a rural mentality that market vendors are mercenary, that if you have excess produce you should give it away and not sell it to your neighbors. In addition she states that, “rural Manitobans can do a lot and they don’t pay for that service if they can do it themselves -- leading to an “ I can do this myself” attitude towards gardening, preserving and baking even if it isn’t actually something you get around to doing.”

Barriers to rural farmers’ markets include a stigma of farmers’ markets as being “small time.” Willard (2003) indicates that farmers find it demeaning, as there is a view that manual labour is old-fashioned, and farming and farmers have adopted a mechanized mentality and mindset. Willard believes that Direct Farm marketing won’t have an impact because the population base isn’t big enough to allow for the economies of scale so that vendors can mechanize.

Market Characteristics

Manitoba markets are generally structured with a board consisting of a president, vice president, secretary, and market coordinator. Due to low board participation some markets that initially held this structure upon establishment have been reduced to the market coordinator taking on all roles associated with running the market.

Responsibilities may include erecting and dismantling signs, coordinating

advertising, space, insurance, health code enforcement, Christmas market coordination, and vendor screening.

Market coordinator interviews showed that major expenses for FM's were insurance and advertising. Table fees are generally collected, with the money going towards insurance and advertising. Occasionally the market coordinator receives a stipend or table fees are waived if the coordinator is a vendor. Markets usually charge a stall rental fee between \$3 and \$20/week with 8 markets charging \$10/week. Some markets offer raffles for 50:50 draws, or meat provided by a sponsor to raise funds for market operating costs.

Vendor Demographics

Market Coordinators reported approximately 278 vendors in the province. Of the vendors that responded to the survey, 81 percent (n= 86) were rural residents. Survey results indicated that the majority of the respondent vendor population was composed of older female vendors. Forty-four percent (n= 103) of vendor respondents reported being over 55 years of age, while 68 percent (n=108) of the respondents to the survey were female.

Weurch (2003) reported that the female vendors he worked with through the Farmers' Marketing Association often used the farmers' market as an off-farm source of income diversification. He indicated that men generally saw the small scale of farmers' markets as demeaning. He recalled how one woman indicated that she called the income she received from farmers' markets her "go to hell money," because when her husband asked her for it she would tell him to go to hell.

Seventy-five percent (n=76) of respondents indicated their households were composed of two adults, while 34 percent (n=34) of respondent vendors had children in their household. Farmers' market vendors reported varying levels of education as indicated in Table 5.23, while 46 percent of vendors reported having accessed some level of post-secondary education.

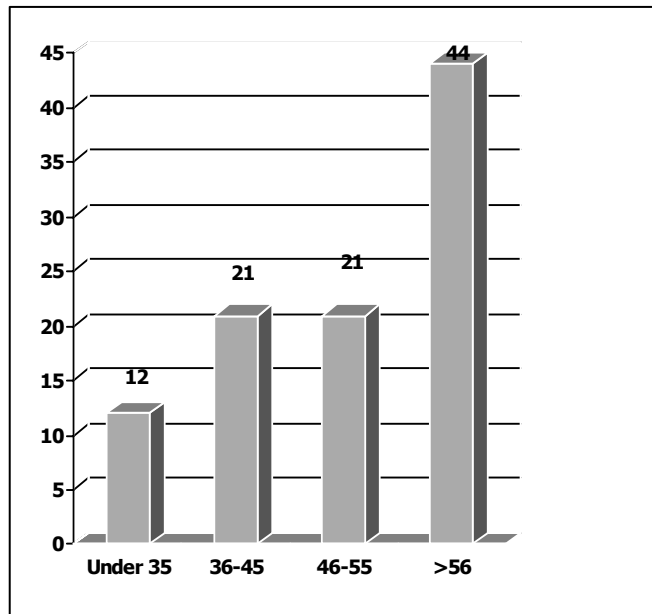


Figure 5.3 Age of vendors

Table 5.23 Vendor Education

Education level	n	Percent
Less than grade 12	32	31.7
High School diploma	23	22.8
Some college and/or university	23	22.8
Completed undergraduate	20	19.8
Completed post graduate	3	3.0
Total	101	100

Combined rural and urban market data indicated that 42 percent (n=108) of vendors who responded to the survey are new vendors who have been marketing for less than two years (Figure 5.4). As indicated in Table 5.24, when asked “Which best describes the community where you live ... urban, suburban, rural” 81 percent of vendors (n=86) indicated they came from rural areas.

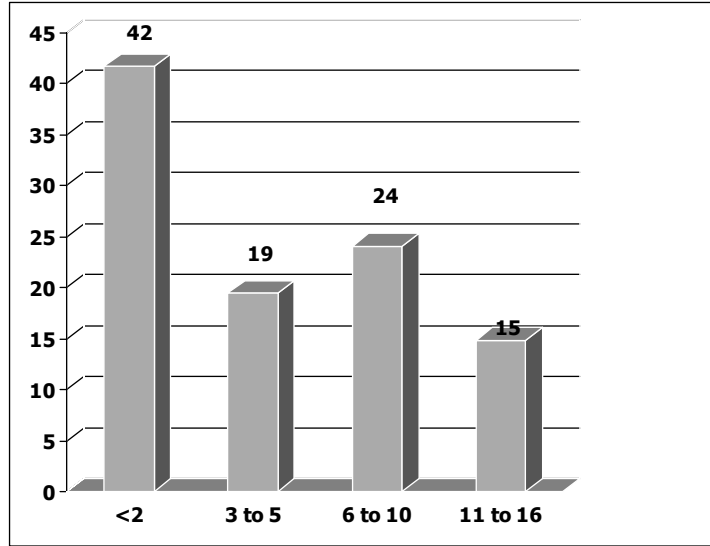


Figure 5.4 Years vending at farmers' markets

Table 5.24 Area of vendor residence

Area	n	Percent
Urban	13	12.3
Suburban	7	6.6
Rural	86	81.1

When asked, 53 percent of vendors (n=58) indicated that they lived in the same community as the farmers' market they sold at. For the remaining 47 percent of vendors who live further away, farmers' markets represent a non-local community activity. Table 5.25 lists the distance from market for those vendors that do not live in the same community as their farmers' market.

Table 5.25 Vendor household distance from market

Distance Km	n	Percent
<10	2	4.2
11-25	13	27.1
26-50	17	35.4
51-100	9	18.8
>101	7	14.6
Total	48	100

Farming

Thirty-eight percent (n=40) of vendors who responded to the survey reported farming in addition to farmer's market activities. Of the farmers who responded to the question "Outside of the market do you farm" (n=40) 53 percent report being full-time farmers, 35 percent being part-time farmers and 12.5 percent self report as hobby farmers.

In addition to vending at farmers' markets Manitoba vendor respondents reported selling their products through a variety of other means. Table 5.26 indicates that for the vendors who responded to the survey home/farmgate sales were the most popular means outside of the farmers' market, while only two percent (n= 108) of vendors marketed through a processor or marketing board. This is consistent with the view of small scale producers marketing through farmers' markets.

Table 5.26 Percent of farmers who market products using various means

Mode of Marketing	Percent (n=108)
Farmers' market	100.0
Home/Farmgate	42.6
Retail	18.5
Other	13.9
Trade show	10.2
Roadside stand	10.2
U-pick	7.4
Community fair	7.4
Wholesale	6.5
Restaurant	4.6
Internet	3.7
Marketing board	1.9
Processor	1.9

Vendor Motivations

Vendors were asked "why do you market at the farmers' market? Please list all reasons." Of the farmers' market vendors who responded to the survey, 33 percent indicated that they marketed their produce through farmer' markets because they enjoyed the experience as a social opportunity to interact with both customers and other vendors (see Figure 5.4). Five percent of vendors who responded to the survey indicated they did so to keep the market going in their community.

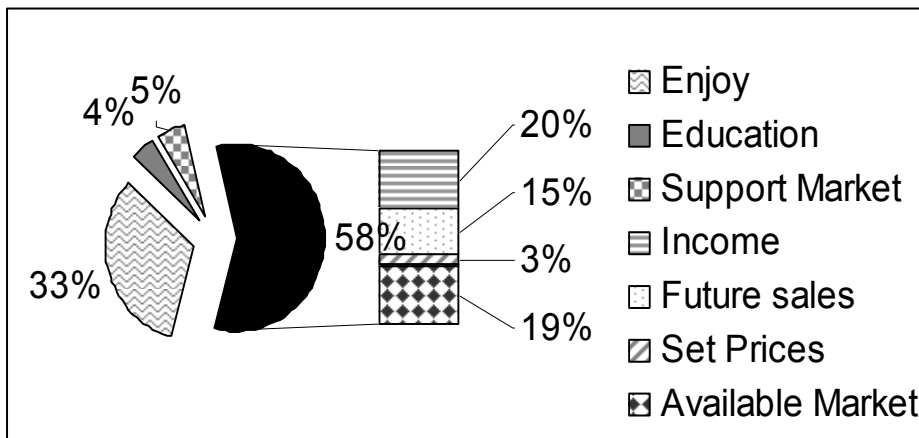


Figure 5.4 Reported vendor motivations for selling at farmers

Grouping vendor responses resulted in 58 percent of vendors citing economic factors for marketing at farmers' markets. Of these, 20 percent of respondents specifically indicated additional income as a motivating factor, while 19 percent responded that their farmers' market provided an accessible venue for their product, and 15 percent indicated that farmers' markets provided an opportunity for future sales through advertising, acting as a test market, and a venue through which to expand their customer base.

These findings are consistent with Alberta's 2003 Farmer's Markets survey which indicated that 44 percent of vendors were marketing for additional family income (8 percent = sole source of income), while 39 percent report vending for enjoyment/recreation.

Vendors

Market coordinators report approximately 278 vendors in the province. Of the vendors who responded to the survey 16 percent report vending at more than one farmers' market. Of those that vend at more than one market, 72 percent vend at two markets per week and 22 percent (n=17) vend at three markets per week.

Figure 5.5 illustrates the Manitoba respondent vendor breakdown by primary product sold.

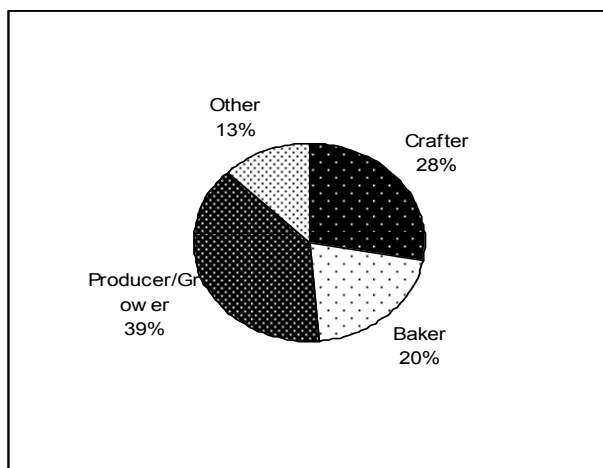


Figure 5.5 Survey respondents by type of product sold (n=111)

Although vendors were asked to describe themselves using only one category survey results indicate that vendors diversify the products they sell at markets. 36 percent of vendor respondents report selling a single product, while 28 percent of vendors sell two products. 33 percent of vendors reported marketing three or more different products.

Figure 5.6 illustrates the percent of vendor respondents that indicate selling various products. The largest percentage of respondents report marketing vegetables during a season while maple syrup is the least reported product sold.

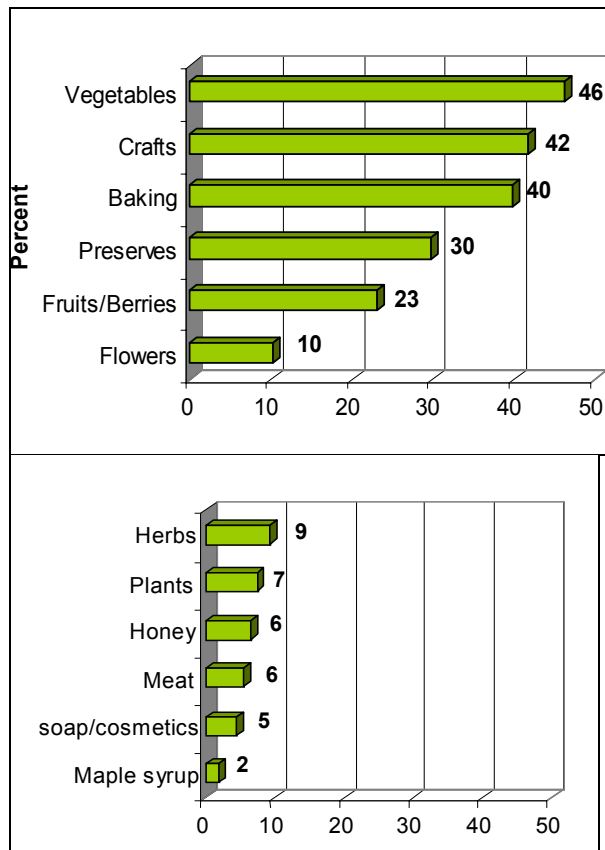


Figure 5.6 Percent of vendors report vending products through various distribution channels

When asked 69 percent of respondents indicated that they were interested in increasing their business, while 71 percent were interested in growing their business through direct marketing. Other responses included increasing customer base through the farmers’ markets (11.5 percent) and selling more from home/farmgate (11.5 percent).

Production

The issue of producing the products sold at markets oneself is an ongoing and contentious issue. While most vendors sell products they have grown themselves, the lack

of fresh produce in the spring is a challenge for most markets, resulting in some producers reselling imported produce. Value-added products are considered “produced” and so some vendors may not necessarily vend products they have grown and instead may vend crafts or preserves made with purchased rather than grown ingredients.

Alberta’s farmers markets incorporate an 80:20 rule whereby 80 percent of vendors must sell products that have been processed or grown by the vendor. This allows for 20 percent of vendors to import products to provide overall balance for the market.

In Manitoba 8.4 percent of respondents to the survey indicated that they resell goods not produced themselves. These items included books about their product, items from other local producers, products that are not able to be grown in Manitoba due to climatic conditions, and cosmetics.

Manitoba market coordinators indicate the need to put systems in place to ensure that vendors are selling locally produced goods.

Market Support

The relationship between markets and their communities varies greatly between municipalities. Farmers’ Markets and their vendors can be viewed as community assets or as groups of individual entrepreneurs. Markets can connect with their communities through individuals, municipalities, local agriculture departments, Chambers of Commerce, and other local businesses.

Market coordinators were asked whether their markets received organizational support. Table 5.27 outlines that the most common supports are municipal provision of the site for the farmers’ market and goods in kind such as photocopying and advice from the local agriculture departments.

Table 5.27 Market supports from various sources

	No	Site/Land	Goods in Kind	Promotion	Total # markets
Municipal	9	9	1	1	20
AG dept	10	1	6	2	19
Other	12	N/A	1	3	16
Chamber	14	N/A	1	4	19
Non profit	17	2	N/A	N/A	19
Industry	18	N/A	1	N/A	19

Organic

9 percent of the 77 respondents to that question indicated that they sold a certified organic product. Of the 85 respondents who answered the question, 44 percent indicated that they sold a “non certified organic product” although they did not indicate what their definition of “non certified organic” was. In addition 14 vendors indicated that they marketed their product using special production methods such as “natural,” “uses organic ingredients,” “no chemicals used,” and “no fertilisers used.”

While the organic industry is growing in the rest of North America the nature of local demand in Manitoba has yet to be determined. As local organic farmer Dan Weins

stated in reference to the Prairie Sun Organic Market “the Market needs more vendors, especially fresh produce vendors, but there simply aren’t that many organic growers around, it’s only a myth that this is growing”(Stevenson, 2003).

Internet

Forty percent of respondents indicate that they use the internet, and of those 50 percent use the internet for their business.

Economics

Based on reported incomes a conservative calculation indicates that the 21 farmers’ markets in Manitoba generate approximately \$600, 000 in gross income for the 268 vendors in Manitoba. Based on known population and sample size this figure is considered to have an error of +/- 7 percent

Figure 5.7 illustrates that 77 percent of vendors earned less that \$299 per week from markets.

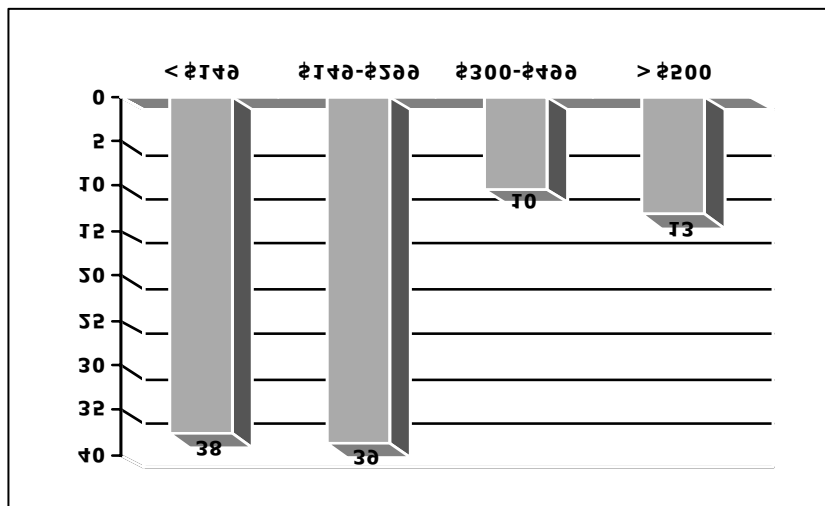


Figure 5.7 Reported average weekly income from farmers’ markets (n=106)

Tables 5.27 and 5.28 illustrate the contribution of direct marketing and farmers’ markets to vendor household income. With the exception of 19 percent (n=10) of survey respondents, 6 of whom were farmers, who obtained 51-100 percent of their household income from direct marketing channels, farmers’ markets contributed less than 10 percent of household income for the majority of vendors.

Table 5.28 Percent of household income from all direct marketing

Percent of Household income	n= 54	Percent
0-5	15	27.8
6-10	14	25.9
11-20	8	14.8
21-25	2	3.7
26-50	5	9.3
51-100	10	18.5
Total	54	100

Table 5.29 Percent of household income from farmers' markets

Percent of Household income	n=74	Percent
0-5	35	47.3
6-10	22	29.7
11-20	6	8.1
21-25	3	4.1
26-50	5	6.8
51-100	3	4.1
Total	74	100

Vendors were asked if the income received from the farmers' markets was enough to cover all costs including labour, transportation, and inputs. Of the vendors who responded to the question, 62 percent (n=104) said "Yes." However, of those respondents that indicated costs were covered, 17.3 percent indicated that it barely covers costs, or that costing for labour is not feasible. Of the 39 percent (n=104) that indicated that the income from farmers' markets did not cover production costs, 27.5 percent (n=40) indicate that costing for labour is not feasible.

Spearman's Rank correlation coefficient (ρ) for ordinal data was used to analyse farmers' market hours worked per week and weekly farmers' market income and was found to be significantly correlated at the 0.01 level (2 tailed, 0.471). These hours represented hours worked only by the survey respondent, and do not include additional hours provided by family members and employees. This positive correlation indicates that while farmers' markets are labour intensive there is significant correlation between hours worked and income obtained.

When asked if they used the income from farmers' markets for a specific purpose 53 percent of respondents indicated that they did. Of the respondents who used the income for a specific purpose 44 percent (n=23) used the money for day-to-day household expenses such as bills, property taxes, loan payments, food, and transportation (Figure 5.8).

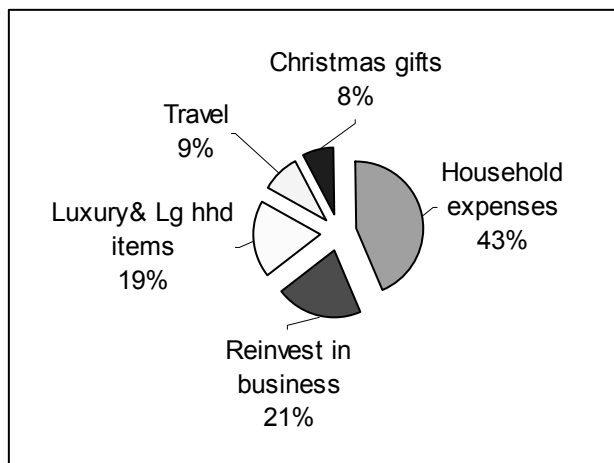


Figure 5.8 Vendor use of farmers' market income

Impact on Local Economy

Farmers' markets can be viewed as competition for local businesses. However research has shown that markets can bring new business to communities. Cummings et al (1998) found that almost 50 percent of customers shop at local businesses as part of their outing to the farmers' market. The findings were similar in Manitoba where 65 percent (n= 82) of farmers' market customers surveyed said they visit other stores either before or after the market.

In Ontario the majority of interviewed businesses perceived increased sales on market days, especially for those businesses in close proximity to the farmers' market. In Manitoba, when asked about relationships with local business 65 percent (n= 20) of the respondent Market Coordinators indicated that the relationship was supportive. Thirteen percent indicated an antagonistic relationship and 8.7 percent indicated that the relationship was neutral.

In addition to consumer purchases local businesses benefit from vendor purchases of supplies and the spending of farmers' market income locally. At least 74 percent (n=105) of vendors purchased some of their supplies locally, while 38 percent of vendors purchased over half of their supplies at a local store.

Willard reports:

Most vendors spend their money locally, they could get cheaper supplies [at a larger centre] but they often don't have enough time. After a market all the vendors are tired and it's easier to just go down the street and spend the money that they make in town. Most supplies are bought locally and there is a huge impact from the market ... baking alone requires miles of saran wrap, napkins, pie plates, tart shells and then there's mason jars ... I remember when [a rural hardware store] was bringing in mason jars by the pallet for market vendors (2003).

Some local businesses were aware of the benefits of the markets to the local economy. Willard indicates that at town meetings where farmers' markets were attempting to secure vending sites on municipally owned land, hardware store dealers stood up in support due to their awareness of the local economic impacts of the farmers' markets.

Both vendors and Market Coordinators surveyed (n=21) identified the importance of relationships with local business. In Manitoba several of the markets had fostered innovative relationships with local business where local stores and service providers were sponsors of the market and paid for joint advertisements or provided refreshments and acted as market hosts for the week. One Manitoba market, after consultation with the local community, placed the farmers' market close to appropriate local businesses such as coffee shops, restaurants, and other grocery stores so that the community as a whole could benefit.

Labour

The most common labour sources outside of the primary producer were an unpaid spouse (n=42), and unpaid children (n=14). Figure 5.9 indicates the hours per week spent on total direct marketing in the household. When asked who the main vendor was at the farmer's market table or stall 69 percent of respondents (n=75) indicated self, while 28 percent (n=30) indicated self and a family member.

Only 7.8 percent (n= 103) of respondents reported that direct marketing was their families primary source of income. For those that hold jobs outside of the farmers' market only 50-57 percent were full-time and 25-30 percent of these jobs were agriculturally related. Fifty three percent (n=46) of vendors report that their spouses also hold off-farm jobs. When asked, 75 percent (n=77) of respondents who held a non-farmers' market job indicated that they would not want to earn all their income from farmers' markets.

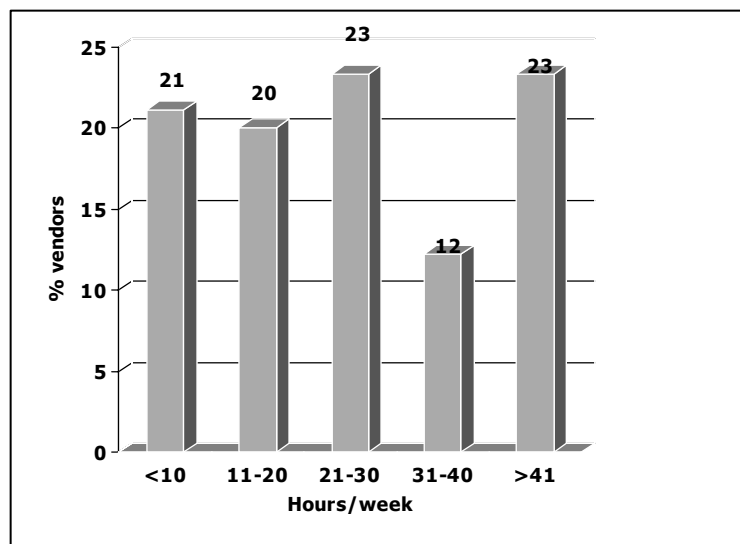


Figure 5.9 Hours per week spent on Direct Marketing

Farmers' Market Customers (Consumer survey)

As was discussed in the methodology section, the low numbers of surveyed customers means that this sample cannot be assumed to be representative of all farmers market customers.

Although the majority of customers surveyed were very pleased with the markets, some customers were looking for more variety in the farmers markets.

Vendor Consumer Interactions

When asked, "how important is it for you to directly connect with your customers at the farmers' market," 89 percent of vendors indicated it was "very important." Coded responses to "why or why not" are listed in Table 5.30.

Table 5.30 Reasons for importance of connecting to consumers

	n	Percent
Good salesperson	49	58
Customer feedback		
Future orders		
Educate customer	18	21
Enjoy	16	19
Total	83	97.7

Farmers' Market Customers

As was indicated in the methodology section the low numbers of surveyed customers (n=120) means that this sample cannot be assumed to be representative of all farmers' market customers.

Farmers' Market Customer Demographics

Of the surveyed consumers 78 percent were female (n=98) while 64.5 percent (n=83) have two or fewer people in the house. Forty-one percent were over 55 years of age while 60 percent were over 46 years old. This indicates that seniors were important FM customers, especially in rural areas. Some markets incorporated large print, small portion sizes, assisted transportation, or locate close to seniors' homes to accommodate their aging customers. Over half the consumers surveyed (n=134) indicated that they lived less than 10 km from the market.

Ontario's 1998 survey found that 65 percent of customers were women and that 70 percent of the customer base was over 45 years of age. In addition, the majority of customers lived within a 10 minute drive to the market.

When asked how often they attend the market 50 percent (n=110) of respondents indicated that they attended weekly. However, it should be noted that the majority of regular attendees arrived earlier in the day, a fact not illuminated by random sampling.

Table 5.31 Frequency of attending farmers' market

Frequency of market attendance	Percent n=
Weekly	50.9
2 times per month	17.3
Monthly	10.0
1-3 times per season	21.8

Motivation

When asked about the most important reason for coming to the market, 42 percent (n=127) of respondents indicated that they came for produce, 17 percent indicated “freshness,” and 13 percent indicated the social aspect/supporting the market. The products consumers listed as being purchased “regularly” were vegetables (n=111), baking (n=49), and fruits and berries (n=32). Ontario’s survey also indicated fresh produce was the primary attraction for customers, while Alberta’s survey revealed that the most commonly purchased items were potatoes, baked goods, BC fruit, and mixed vegetables.

When asked “How did you hear about the market” 32 percent (n=127) of respondent consumers indicated they had “always known” about the market. Table 5.32 lists how consumers who responded to the survey became aware of the market.

Table 5.32 How consumers became aware of the market

	n=127 Responses=166	Percent
Always known	53	31.9
Word of mouth	41	24.7
Drive by	24	14.5
Newspaper	17	10.2
Road side signs	14	8.4
Flyer/poster/brochure	9	5.4
Radio	5	3.0
TV	3	1.8

Consumers were asked if they purchased organic foods. The results are listed in the Table 5.33 below.

Table 5.33 Frequency of purchasing organic foods

Response	n	Percent
Never	53	42.7
Sometimes	56	45.1
Regularly	15	12.1
Total	124	100.0

Economics

When asked how much money they usually spend per visit, 24 percent (n=123) of respondents indicated they spent less than \$10, 33 percent spent between \$11 and \$20, and 16 percent spent over \$20 with the maximum amount being \$60. When asked 83 percent (n= 90) of respondents indicated they would like to purchase more of their food directly from farmers.

Social Aspects

Survey participants were asked to identify the importance (very, somewhat, or not important) of community atmosphere when buying at a farmers' market. Eighty-nine percent attached some level of importance, with 61 percent (n=122) of respondents indicating that the community atmosphere was "very important." When asked about the importance of buying local 94 percent (n=123) attached some level of importance with 78 percent of respondents indicating that it was very important to buy local.

When asked about the importance of meeting the person that grew their food, 72 percent (n= 107) attached some level of importance with only 30 percent of respondents feeling that it was very important to meet the person who grew their food.

Consumer suggestions for improvement

Thirty-one percent of customers who responded to the survey were somewhat or not satisfied with the variety at the markets while 28 percent indicated that more vendors would improve the market. Of the consumers who requested additional products at the market:

20 percent of consumers would like to see more fresh fruit, or could not find it

20 percent of consumers would like to see more produce

17 percent of customers are looking to purchase meat and related products

Weurch indicated that based on his experience with the former provincial Farmers Marketing Board, produce is much more popular at urban markets while baking is in higher demand in rural markets. He indicated that rural people may eat frozen peas instead of fresh peas and that rural women are more likely to be employed outside the home and travel longer distances thus they buy baking for convenience.

Challenges

At this point a preliminary review of the challenges to Farmer's Markets suggest that the challenges mirror those faced by rural communities more generally. Broadly speaking challenges appear to include rural out-migration, aging populations, labour availability and cost, economies of scale, length of the growing season, lack of supports and marketing channels, transportation, and low rates of return.

When asked about market challenges vendors identified the areas listed in Table 5.34.

Table 5.34 Vendor Identified Farmers' Market Challenges

Challenges	N=120	Percent
Weather	30	24.0
Time consuming - Getting good help	20	16.0
Fluctuating demand - Not selling all produce	15	12.0
Transportation	13	10.4
Failing market - Lack of vendors, diversity of products, customers, facilities, or advertising	13	10.4
Pricing - Profit/Cost ratio decreasing - Vendors underselling	10	8.0
Educate customers	9	7.2
Food Storage	6	4.8
Displaying	4	3.2

Based on interviews it appears that the collapse of Manitoba Farmers Market Association has:

Isolated markets and created an image of FM vendors as independent entrepreneurs vs. belonging to a larger body.

Removed the central coordination for negotiating new products with the health board.

The majority of markets appear to receive little support from Manitoba Agriculture, local Chambers of Commerce, or local businesses (notable exceptions are Morden, Steinbach, Brandon, and Swan River).

Health codes

Market coordinators who were involved with the MFMA are aware of restrictions (make it – bake it-grow it, health regulations and allowable products (no second hand goods)) however these individuals are getting older and retiring and younger coordinators may not be aware of all regulations. Overall Market Coordinators appear to be well informed regarding health codes although there is some confusion over which meat products are allowed to be sold.

Conclusions

The findings reveal that the farmers' market model provides an opportunity for vendors including farmers, and rural and urban residents to diversify their incomes. While it appears that financial returns are limited when compared to hours worked, 63 percent of vendors indicated that they were making a profit.

While the income from farmers' markets is not a large amount in strict dollar

terms it is important to note that in addition to the community benefits, farmers' markets create local jobs and have a multiplier effect in the community.

For vendors with other work outside of the farmers' market only half reported working in full-time jobs. Thus, it would appear that farmers' markets provide additional, flexible employment opportunities to supplement both full and part-time household income. The addition of farmers' market to a livelihood portfolio appears to represent an attempt to increase standard of living rather than a specific poverty alleviation strategy.

As previously stated, when asked about motivations for selling at farmer' markets 33 percent indicated the social aspects and enjoyment as motivating factors. The majority of respondent vendors attached some importance to connecting to customers although the majority of responses related to good salesperson techniques. Nineteen percent indicated they enjoyed connecting to customers.

Geographically just over half of the surveyed vendors reported living in the same community as the farmers' market they sold at, while the majority of non-resident vendors lived within a 50 km drive. Of the consumers who responded to the survey 58 percent report living within 10 km of the market. This indicates that regardless of intent to create opportunities for social interaction, the markets play a role in facilitating vendor-vendor, vendor-consumer, and consumer-consumer interactions by bringing local residents together in a common space. In addition, several vendors made reference to the family nature of the farmers' market business with one vendor indicating it was a "family project."

It is clear that while social connection and thus the development of social capital were not expressed as primary motivating factors they are important elements of farmers' markets. Consumer demographics from this study and other Canadian research indicate market customers are often older, living in a two-person household. Markets provide opportunities for the community and intergenerational social interaction that form a basis for the development of relationship building. This interaction has the potential to lead ultimately to the development of trust and at least in some limited forms manifestation of market-bound reciprocity (i.e. customer loyalty).

Financial returns to asset investment have been listed in the results section. For 45 percent of the respondent vendors the farmers' market model appears to provide financial returns sufficient to cover the use of human capital assets. To avoid insufficient returns to labour vendors cautioned that you should "Pay yourself adequately," and "Don't undersell yourself."

The following comments revealed vendor challenges with the model, such as "Don't start with the expectation of easy money because it isn't," "Hard way to supplement a farmer's income," and even "If you are out to make a living forget it."

In actual income terms 77 percent of vendors reported earning less than \$299 per week, which for an average 10-week vending period would provide around \$3,000 gross per summer. For 47 percent (n=35) of respondent vendors farmer' markets contributed less than five per-cent of gross household income, while for 30 percent of vendors farmers' market income represents between six and 10 percent. Overall it is evident that farmers' market contributions to household financial capital are marginal. However, 53 percent indicated that they saved the income from the farmers' market for a specific purpose, indicating that this income is a planned contributor to household financial assets.

As Willard (2003) stated, when "compared to commercial agriculture this may not

seem like a lot of money but to vendors it was important.” For example 44 percent of the respondents who saved income for a specific purpose indicated that this income was for household expenses related to subsistence which includes food, household bills, and transportation. Additional income was used for items contributing to quality of life such as luxury and large household items, travel, and Christmas gifts. The deliberate action of diversifying livelihood activities with the goal of saving income from those activities for subsistence household expenses such as food, bills, and transportation, indicates that farmers’ markets provide an opportunity for a sustainable livelihood activity. For 21 percent of respondents the income from farmers’ markets was reinvested in the business, indicating a long-term commitment to the farmers’ market model as part of a livelihood strategy.

A conservative estimate indicates over 10,000 consumers per week visit the 21 interviewed Manitoba farmers’ markets. In addition to increasing community food security the markets appear to provide many positive economic and social transfers for the community. These include local employment, skill generation and preservation, environmental benefits, economic benefits to local businesses such as increased retail trade through the purchase of supplies for the farmers’ market, and the increased local and tourist consumers brought to the market who make purchases at local stores. As was mentioned in the previous section, farmers’ markets create a link between rural and urban residents and between agricultural and non-agricultural communities.

In contrast to the CSA, the farmers’ market model creates a geographical as well as ideological meeting place, and due to their broader appeal and flexibility, farmers’ markets provide an opportunity for people of different ideological backgrounds to meet and develop connections. These benefits may explain why some municipalities are initiating farmers’ markets as part of local economic development strategies.

GENERAL CHALLENGES TO LOCAL FOOD SYSTEMS IN MANITOBA

Current Agriculture and Food Policies – A Barrier?

While Canada currently does not have a national food policy, some elements of one are captured in Canada's Action Plan on Food Security. Canada's Plan was a response to the World Food Summit Plan of Action of 1996, resulting from the Rome Declaration on World Food Security. One hundred and eighty-seven countries signed the declaration, which called for a reduction by half in the number of undernourished people on the globe. Canada's Plan "recognizes that food security implies access to adequate food and sufficient food supplies and that poverty reduction, social justice and sustainable food systems are essential conditions." (Centre for Studies in Food Security, 2003) But as was highlighted at Canada's first-ever food security conference in 2001, what is really needed is the political will and action to carry out the plan (Koc, MacRae, 2001).

Canada's Agriculture Policy is captured in the *Federal-Provincial-Territorial Agreement on Agriculture and Agri-Food Policy for the Twenty-first Century*, (2002) also known as the Agricultural Policy Framework (APF).

At present, Manitoba does not have a food policy or a food security action plan, nor has Manitoba endorsed Canada's Action Plan on Food Security. Manitoba's agriculture policy can be summarized in two key documents: "*Destination 2010, A Strategic Roadmap for Agriculture and Food*" (Manitoba Agriculture and Food, undated) and the aforementioned APF. Destination 2010's introductory section lays out the premise that "tremendous new avenues for economic growth will open up in Manitoba and that every sector of the provincial economy will be forced to change and adapt." The report focuses on six individual themes, which include farm profitability, sustainability, food safety and quality, diversification and adding value, market development, and agricultural awareness.

Destination 2010's stated vision is to provide farm families, rural communities, and agriculture and food partners a higher quality of life by becoming more prosperous and economically stable. The policy suggests that Manitoba's agricultural and food sector can become more profitable and competitive through expanded diversification and adding value to existing agricultural products, a growing livestock sector and greater market orientation – all within a sustainable agricultural framework.

Destination 2010 makes it clear that Manitoba's farm policy is centered on expanding export-based commodity sectors. Supportive policy, from Manitoba Agriculture, Food and Rural Initiatives (MAFRI), complements this generalization:

Manitoba is heavily dependent on agri-food exports. Manitoba farmers, with some of the most efficient and technologically advanced operations in the world, will benefit greatly from increased market access, elimination of export subsidies and a decrease in domestic support. The prosperity of agriculture in Manitoba in the 21st century will be dependent upon increased diversity of production, obtaining maximum returns for exports by adding value to commodities prior to their export, and by increased livestock production. All of these activities will require access to

existing and emerging markets (Manitoba Agriculture and Food, 2003).

MAFRI has targeted existing and emerging markets in Latin America and Asia. The International Trade Section of MAFRI is working collaboratively with industry, associations, and other governments to implement trade support development programs in these areas (Manitoba Agriculture and Food, 2003).

While Manitoba Agriculture acknowledges the need to develop strategies and programs for the local market, MAFRI emphasizes the importance of the global marketplace for developing new markets. This bias towards export is expressed in the market development section of Destination 2010, which calls for the support and development of international agreements and laws to ensure a level playing field and market access for Manitoba's agri-food exports. In addition the need to oppose trade challenges detrimental to the Agricultural industry is identified.

In addition Destination 2010 identifies "diversification and adding value" as key strategic routes. While the term "diversification" is not clearly defined in the report, recent production trends across the province revealing a shift in production from the grain sector to the livestock sector gives us an indication of this definition. Destination 2010 also fails to define the meaning of sustainability or sustainable agriculture, another key route contained within the policy. Instead the report establishes a broad range of goals and commitments under the banner of sustainable agriculture which include:

- an emphasis on long term approaches to natural resource conservation;
- an integrated approach to facilitate the transfer of farm operations between young/beginner farmers and retiring producers;
- industry cooperation to ensure continued adherence to accepted codes of practice in animal welfare;
- assistance to the agriculture community in adapting to climate change and participation in activities that reduce greenhouse gas emissions;
- working with partners towards training, development and encouragement of rural leadership and youth; and,
- improvement of on-farm water quantity and quality through improved flood controls, drainage systems and infrastructure (p 13).

Agricultural Policy Framework

Signed in September of 2002 by the government of Manitoba and the federal government, the framework agreement on agriculture and agri-food sets the direction in which both governments will work together on developing and adjusting programs, services and tools to help producers succeed now and in the future (Agriculture and Agri-Food Canada, 2002). Similar bi-lateral agreements were signed between the federal government and all other provinces and territories in Canada.

Comparable to Manitoba's agricultural policy, Destination 2010, the APF lays out the policy direction and program spending to be shared over the next 5 years for agriculture in Manitoba. Emphasis is placed on five main themes: business risk management (as its main focus), food safety and quality, environment, rural renewal, and science and innovation.

Excluding business risk management programs, total spending by Manitoba and Canada is expected to reach \$94 million over the next five years, with Canada

contributing 60 percent or \$56 million. Manitoba's share of \$38 million covers the remainder of the program (Canada Manitoba Implementation Agreement, 2003) Manitoba's 40 percent share will originate from existing budget allocations and not involve any new program spending (per com Schellenberg, 2003).

A further breakdown of the \$94 million reveals that \$43 million, or 46 percent, will be dedicated to enhancing environmental programs with three quarters (\$32 million) of the \$43 million allocated to assist farmers implement an environmental farm plan (EFP). Manitoba Agriculture indicates that Manitoba's environmental spending in the APF is proportionately higher than most other provinces (per com Schellenberg, 2003). This may be explained by a recent Statistics Canada report indicating that the Prairie Provinces have the lowest average investment in agricultural environmental protection in Canada. (Statistics Canada, 2004)

Manitoba's spending under the APF business risk-management programs, which include crop insurance and Manitoba's contribution to the Canadian Agricultural Income Support (CAIS) program, is expected to reach \$425 million over the same five-year period. With the federal government contributing roughly 60 percent to business risk management programs, total business risk spending by both levels of government will equal \$1.062 billion or approximately \$212 million per year. Total environmental investment from both levels of government, as a percentage of the total APF spending, translates roughly to only 4 per cent.

Recent amendments to the APF Implementation Agreement have also not brought any good news for the small or mid-sized diversified family farm. The CAIS program has increased government payment limits for farm operations from \$975,000 to \$3 million per farm (Manitoba Government News Release, 2004). This amendment reflects current agricultural trends towards expansion, specialisation and economies of scale, and the notion that you need to "get bigger or get out".

At a recent Manitoba Sustainable Agriculture Association conference Owen McAuley, a local Manitoba farm critic, stated that

The new CAIS program safety net for farmers is the latest government policy that penalizes diversified operations. Under the CAIS program, a diversified operation sees a reduced chance of a pay-out from the program because a good year in one sector is used to offset poor returns in another, wiping out the prospects of receiving a pay-out. It's saying "I'm going to take the profits from your cattle to offset the losses on your grain," whereas the fellow across the road relying strictly on grain gets to capture the profits in the big years and the government is paying for the poor years (Rance, Feb. 2004).

The APF Implementation Agreement, which defines the targets, precise program spending, and conditions to implement the framework agreement, further characterizes the "Branding Canada" section by setting targets adopted by the Canadian Agri-Food Marketing Council. The Canadian Agri-Food Marketing Council describes itself as a 30-member volunteer board appointed by the federal Ministers of Agriculture and Agri-Food Canada and International Trade, which provides policy advice to these ministers (Canadian Agri-Food Marketing Council, 2002). The inclusion of international corporations such as the Canadian Pork Council, Maple Leaf Foods, McCain's Foods,

Cargill, and James Richardson International has led to the appearance of the council as an “industry led organization.” The Marketing Council adopted Canadian targets to capture a 4 percent market share of global agricultural and food products by 2005, a one per cent increase from 10 years ago. This target was achieved in 2004 (per com Gregory, 2004).

The APF Implementation Agreement lays out a process for “developing meaningful and broadly supported national targets for the sector’s international performance that goes beyond the Canadian Agri-Food Marketing Council targets” (p 188). New targets are currently under negotiation and will be set for the year 2010 (per com Gregory 2004). As a second target, the Council wants Canada’s exports of processed food items grow from 40 percent of the total agricultural export basket to 60 percent over the same time period.

Manitoba and Canada’s current farm policy is essentially captured in statement that, increased production, increased efficiency, specialization, industrialization, larger operations and increased exports will provide prosperity for farming families and rural communities in Manitoba and Canada.

Canada’s own Action Plan for Food Security supports this policy direction and reinforces the focus on the global market and states that “as a major trading nation, Canada remains committed to more liberalized trade and continues to encourage the competitiveness of Canadian goods and services. Canadian industry is supported through the provision of market intelligence and investment incentives, development of rural communities and promotion of harmonized standards” (Part II, Domestic Actions).

Numerous researchers maintain that international trade agreements such as the Canada-US Trade Agreement, North American Free Trade Agreement and the World Trade Organization are undermining food security (Weibe and Qualman 2002, MacRae 1991, Toronto Food Policy Council 1994, Halweil 2002, Norberg-Hodge et al 2002). As Weibe and Qualman states,

The Canadian government – using the tools of the CUSTA, NAFTA, and WTO, and inspired by the neo-liberal programs of the IMF and World Bank – has turned its families over to “the market.” The result has been a seven-fold increase in exports since 1974, a transfer of the agri-food processing sector to foreign transnationals, the depopulation of rural communities, and the worst farm income crisis since the 1930’s. (p 13).

In December 2003, over 50 international civil society organizations signed the *Statement on Agriculture after Cancun* following the collapse of the World Trade Organization’s Ministerial meeting held in September dealing with trade rules for agriculture (known as the Doha Round). In its preamble, the Statement on Agriculture identifies the main problem associated with the WTO:

The WTO exists to promote liberalization, and trade negotiators focus almost exclusively on the speed and form of this liberalization. Trade officials are committed to increasing agricultural exports whatever the cost. But these costs simply cannot be ignored. They include devastating impacts on family farmers, peasants, fisherfolk, farm and food workers and consumers everywhere, and severe environmental degradation

wherever intensive farming for export is introduced. Prioritizing production for export over production for national and local markets leads to local food scarcity. It divorces food, farming and fisheries from their social, cultural and environmental contexts. It weakens governments' abilities to develop policies focused on local needs. It enables the trade interests of the largest corporations to prevail. (Via Campesina, 2003).

The Statement calls on peasants, family farmers, fishers and their supporters to develop a global food policy and strategy which supports the concept of "People's Food Sovereignty" as an alternative to US/EU and G20 country trade positions. (Full statement at www.viacampesina.org)

Investment Incentives in Manitoba Supporting Industrialized Agri-Business

As has been discussed in preceding sections, hidden and direct agricultural policies and subsidies currently favour large-scale farms, industrialized agribusiness, and corporate middlemen. These supports provide market advantages for specialized commodities traded in the global export market and lead to artificially low prices. Norberg-Hodge et al (2002) describes how cheap food allows corporations to invade and dominate local food economies, to the detriment of both farmers and consumers.

The following provides an example of recent Manitoban and Canadian investment incentives (subsidies) in the province's potato industry.

Potatoes

Manitoba is now Canada's second leading potato-growing province, nearing Prince Edward Island for total acreage. The recent JR Simplot potato plant built in Portage la Prairie processes french fries for the U.S. fast food market. Built in 2003, it is reported (Manitoba Intergovernmental Affairs, 2003) that the large privately owned U.S. transnational, and its host city, received millions of dollars in government funding to upgrade and build new infrastructure associated with the new processing plant.

Investment incentives in this private public partnership include:

- a 138 acre site
- an access road to the site;
- water plant upgrade for the City of Portage la Prairie (to guarantee a safe and abundant supply of water for processing the french fries);
- wastewater plant upgrade (to handle the additional wastewater);
- pre-treatment wastewater plant (for the french fry plant);
- water pipelines;
- wastewater force-main;
- irrigation infrastructure assistance over the next ten years; and,
- an employment and training package (Province of Manitoba et al, 2000).

Over a ten year period total investment from the three levels of government is estimated to be \$150 million (Manitoba Intergovernmental Affairs, 2003 p 5). During the course of this research attempts to obtain the actual figure were denied based on freedom of information legislation.

In return for this support Simplot built a \$120 million french fry plant, employing an initial 230 workers at the plant, with a possible increase to 350 by year five should

Simplot expand their plant to a second shift. 500 indirect jobs, presumably related to potato production and the plant are also anticipated (Manitoba Intergovernmental Affairs, 2003).

In 1998, Manitoba listed as having 150 commercial potato growers in the province harvesting 73,000 acres of potatoes. In 2002, 124 commercial potato growers harvested 85,000 acres, a 17 percent decrease in growers with a 14 percent increase in total acreage harvested. This represents a 41 percent increase in potato farm size from 487 acres to 685 acres in the last 4 years (Manitoba Agriculture and Food 2000, 2003).

At the time of writing, 2003 potato data was not yet publicly available. This data would include Simplot's requirement of an increase in Manitoba potato production by 20,000 new acres. However, based on Simplot's expressed requirement to contract with experienced growers, the National Farmers Union (2002) predicts that to supply the new plant, no new potato growers will be involved. The National Farmers Union further predicts the continuation of the expansion trend requiring existing potato farms to increase the size of their operations by 160 acres to supply Simplot's demand.

Environmental impacts resulting from potato growing have been well-documented in North America (Burton & Ryan 2000, Ewanek 1995, Madramootoo et al, 1992). Potato growing requires large quantities of water for irrigation, the extensive use of chemical fertilizers, herbicides, and insecticides for the control of diseases, insects and weeds.

At environmental hearings for the Simplot project, opponents critically questioned the benefits of the size and scope of public investment in the project. A benefit/cost analysis was never performed on this proposal and was subsequently deemed unnecessary.

The National Farmers Union points out that,

With the current industrialized model, increased potato production brings clear environmental costs – increased insecticide and fungicide spraying, increased fertilizer use, increased water use, surface and groundwater contamination and the potential for increased soil erosion. At the same time, no new family farms will be created with this investment nor will the trend of family farms going out of business be reversed. (National Farmers Union 2002).

New diet preferences in North America have created additional challenges for Manitoba's potato industry while highlighting the vulnerability of reliance on the global market. Recent global dietary changes brought on by the popularity of low carbohydrate programs such as the "Atkins Diet" have led to decreased sales of french fries by transnational fast food giants such as McDonald's and Burger King. Local farm media reports (Rance, Feb 2004) indicate that the effects of the Atkins Diet have been felt at the producer level in Manitoba. Up to 15 existing potato growers supplying the new Simplot plant have had their contracts cancelled while other contracts have also been scaled back (Rance, April 2004).

OPPORTUNITIES FOR INCREASING LOCAL FOOD SYSTEMS

Slowing the import flow

A primarily export/import driven food and agriculture policy in Canada and Manitoba has increased the value of Manitoba's international exports of food items (unprocessed, semi-processed and processed) almost two-fold in the last ten years (1992-2002) to a value of \$2.75 billion (Manitoba Agriculture Yearbook, 2002). In the same time period, Manitoba's international imports of food and agriculture items have increased three-fold to close to \$1 billion. While Manitoba's international food trade balance suggests a healthy positive balance, once one removes the top five specialized commodities in the province (pork/pig, wheat, cattle, canola/oil and processed potatoes) we see a different story. In 2002, these top five commodities had an international export value of nearly \$2 billion or 70 percent of Manitoba's total food and agriculture exports, representing a fifth of Manitoba's total international exports. These same five commodities have farm cash receipt values of \$2.5 billion, two thirds of Manitoba's total farm cash receipts of \$3.8 billion.

According to the Manitoba Bureau of Statistics (2004), inter-provincial imports of agricultural products, manufactured food, beverage, and tobacco products amounted to slightly over \$1.8 billion dollars in 2002.

How food secure or self-reliant is Manitoba? Manitoba Agriculture reports that, "although a portion of the food consumed by Manitobans is imported from other provinces or countries, about half of the food sold by Manitoba's grocery and other food stores is derived from products grown and processed in Manitoba" (Manitoba Agriculture and Food, 2003).

Manitoba's definition of food security however, implies that, if beef cattle were raised in Manitoba finished in Alberta, then slaughtered and packaged in Alberta, and then returned back to Manitoba as a final product at retail, this particular food item would be included in Manitoba's definition of 50 percent food self-reliance. At the same time, over 3,000 kilometers in food distance would be placed on this item. The same can be said for wheat grown in Manitoba, then shipped, unprocessed, to Eastern Canada, and returned as a processed item such as pasta, crackers or baked good.

Following the principles of sustainable agriculture, community economic development, and local food self-reliance, tremendous opportunities can be created through decreasing imports of agriculture and manufactured food items. By plugging the export leakages an abundant market opportunity valued at \$2.7 billion (in 2002) exists for local producers and local appropriately scaled food manufacturers within Manitoba. Any market intelligence and subsidy program must exploit this domestic regional market.

Table 7.1 provides a brief picture of some of the agriculture and manufactured food items imported into Manitoba from international (mainly US) destinations. Detailed inter-provincial trade data for agriculture and manufactured food items are not publicly available in a non-aggregated format and is deemed confidential. Considering that over \$1.4 billion dollars worth of manufactured food items were imported into Manitoba inter-provincially in 2002 (Manitoba Bureau of Statistics, 2004) Table 7.1 may provide some insight into the types of manufactured food items arriving from other provinces.

Table 7.1 Value of Manitoba Food Imports (Source: Manitoba Agriculture 2003)

Manufactured Food Product	Value of 2002 Imports (excluding Inter-provincial trade)
Cocoa, chocolate and other processed food	\$86 Million
Red meats, processed meats and poultry products	\$80 Million
Vegetables and legumes	\$76 Million
Fruit and nuts	\$60 Million
Grain products	\$54 Million
Beverages	\$39 Million
Sugars and confectionery	\$29 Million
Dairy products	\$12 Million
Processed eggs products and eggs	\$10 Million
Coffee, tea and spices	\$7 Million
TOTAL	\$453 MILLION

Halweil (2002) reasons that rebuilding local food systems might offer the first genuine economic opportunity in farm country in years, a pressing need in view of the huge amounts of money leaking out of rural communities.

A vibrant local food economy can be developed with a diverse array of policy and financial instruments. This report does not suggest that, under current conditions and at their current scale, the three food models under investigation (Farmers Markets, CSA's and the Winnipeg Humane Society labeling program), present "silver bullet solutions" to the farm economic crisis in Manitoba. These models, along with numerous other direct marketing programs such as U-picks, community gardens, road-side stands, food buying clubs, and subscription services, present alternatives to the current food system and are examples of community economic development strategies that could foster a self-reliant food economy. Agriculture and food policies that support the creation of a local foodshed linking producers and consumer should be developed.

As discussed in the Farmers Market vendor survey results, economic and agricultural diversification was a common theme amongst the vendors surveyed. Forty percent of the vendors surveyed reported that their families were involved in a farm operation. In addition to farmers' market sales, almost all vendors reported marketing their goods by other means such as at the farm gate, retail, trade shows/community fairs, roadside stands, u-pick, wholesale, restaurants, marketing boards and the internet.

Scott (2001) found that organic food producers marketing directly to consumers received better prices for their products. A recent Statistics Canada study (2004) also reveals that consumers who buy directly from the producer may place a greater premium on the freshness of the product, the sustainability of production practices, and the type of personal relationship between producer and purchaser.

Consumer direct marketing models have proven beneficial for those farmers who have been able to develop the appropriate skills and ingenuity to become successful small-scale entrepreneurs. However, researchers have shown (Kirchenmann 2003, Levins 2004, Mahoney 2004) that in order for these models to develop enough to affect the local economy and increase farm viability, they must pool marketing resources. Scott

(2001) reported that in addition to direct marketing, producer cooperation and supply management schemes were found to increase farm product prices relative to expenses.

At their Brandon conference, the Agriculture Rural Renewal Alliance (2000) stressed the importance of individuals working together. “Farmers need to overcome their inclination to work alone, and forge alliances among themselves to increase buying power and marketing clout. In addition alliances must also be forged with consumers and groups of non-farming people.”

By pooling resources farmers can take advantage of new found economic clout. Besides increased buying and marketing power, resources such as knowledge and labour can be shared. Building alliances between the non-farming public (consumers) and farmers adds the advantage of reconnecting the general public to farming and food production. (Agriculture Rural Renewal Alliance, 2000).

Kirschenman (2003) paraphrases Rick Schneider CEO of SYSCO, the world’s largest distributor of food products for the restaurant and institutional sectors in North America. “Sustainable produced foods are in demand and that demand is growing. (The) sustainable agriculture community must build a supply chain, that’s the piece missing. We don’t have the infrastructure in place to connect the farmer that can produce the foods with the customer that wants to buy them” (p 24). Norberg-Hodge et al. (2002) notes that institutional and structural change can happen when we think “small scale on a large scale”.

While this report does not purport to recommend a specific model the following examples describe some currently operational producer/consumer food models that represent various strategies for food distribution. In addition these models have the potential to increase farm viability.

Delivery Service or Brokering Service (Box programs)

The box programs, similar to a community shared agriculture program, exist where a broker or middle person (incorporated as a regular business) procures locally grown and raised food from various farm sources and delivers the basket of goods usually on a weekly basis to subscribed customers. This scheme can also be administered by a non-profit organization and operated as a social enterprise. Local examples include Fresh Option Organic Delivery, the West Broadway Good Food Club, and Organic Bread Basket.

Food Buying Club

Food buying clubs are usually comprised of a group of friends, acquaintances or neighbours who voluntarily pool their food basket requirements and purchase food items in bulk with local farmers and/or organic wholesalers. The authors are aware of a number of food buying clubs in existence in Winnipeg. Since food buying coops are voluntary and relatively informal in nature, the number of clubs and households served is difficult to estimate. However, the expansion of this particular food model has led a major organic food wholesaler and distributor, based out of Vancouver, to develop a new policy limiting the expansion of neighborhood food buying clubs. The company in question will no longer deal with food buying clubs who’s members reside within 3 kilometers of an organic retailer that they supply.

Strategic Alliance or Partnership

A strategic alliance can be a group of producers who pool their resources and partner with other groups within the value chain such as a processor, packager, distributor or specialty retailer. The marketer of the end product usually makes a consumer claim of superior quality because of its traceability to the farm and the production system utilized. Eco-labels such as, “natural,” “free range,” “free farmed,” “pesticide free,” “antibiotic free,” “locally grown” and “family-farmed” are usually used to market the product. A strategic alliance can be incorporated as a regular business or as a cooperative.

Vertically Integrated Structure

Vertically Integrated Structures are similar to a strategic alliance, however the business entity usually sells a food product higher up in the value chain, such as a processed food item. The incorporated entity (either as a regular business or cooperative) will control or own as many aspects of the value chain as possible.

Institutional Supply Network

Institutional Supply Networks occur where farmers pool their resources either as a cooperative, non-profit organization, or regular corporation and sell their locally produced food to a variety of institutions including colleges, universities, nursing homes, hospitals, corporate cafeterias, conference centers, hotels and restaurants, and government run institutions (prisons and cafeterias). It is estimated that Manitoba’s food service industry (restaurants, caterers and taverns) was worth close to a billion dollars in receipts in 2002 (Statistics Canada, 2003).

Farm Shop

A Farm Shop is composed of a group of farmers producing a variety of products who join together either as a cooperative or regular business to acquire and manage a food store that sells their product exclusively.

Cooperatives

Manitoba Agriculture, Food and Rural Initiatives, which currently houses the cooperative development section of government, describes cooperatives as a distinct type of corporation formed to provide their members with the goods or services required to meet economic, social or cultural needs.

Differing types of cooperatives include Consumer, Marketing, Or Producer Coops, Community Service, Housing, Worker, Financial and New Generation Coops (Manitoba Agriculture, Food and Rural Initiatives, 2004).

Local Food Councils

One way to facilitate and advocate for local food systems, food security, and sustainable agriculture is the creation of local food councils and coalitions of like-minded organizations on the provincial level. There has been a rapid expansion in the number of food councils across the country.

Kirschenmann (2003) points out that rural/urban coalitions or councils around food and agricultural issues are required because rural communities and farmers no longer have the political clout to bring about the kind of influence on the political system,

to make the shift.

A rural-urban coalition of citizens and/or organizations would be in a good position to help set the agenda for a sustainable agriculture and food policy in Manitoba. Examples of regional and local organizations elsewhere in Canada that support the small and mid size farmers' movement, sustainable agriculture and help develop policy on food security, include FarmFolk/CityFolk in British Columbia, the Union Paysanne and Equiterre in Quebec, the Ecological Farmer's Association of Ontario, and the Toronto Food Policy Council. FarmFolk/CityFolk (2003) point out that one of the challenges that existed for community food coalitions in B.C. was how to integrate the full spectrum of interests in the food system, particularly those involved in agriculture with those involved with food insecurity and hunger. Approximately 15 communities in B.C. have formed local food policy councils, which are linked through the BC Food Systems Network. Nationally, organizations and alliances such as the National Farmers Union, Canadian Organic Growers and the Canadian Food Security Network exist to further progressive food and farm policy.

Locally, the Organic Food Council of Manitoba is one of twelve chapters of the Canadian Organic Growers. Its membership is comprised of gardeners, farmers, food distributors and retailers whose mission is to be a leading information and networking resource that promotes the growing and accessibility of organic food and its associated environmental, health and social benefits. Primarily focussed on organic food and organic farming which is considered as the highest form of sustainable agriculture, the Organic Food Council of Manitoba, could serve as a vehicle advocating for local food self-reliance, sustainable agriculture and food security. Within Winnipeg, the Social Planning Council (2004) has embarked on a collaborative process to develop a food security strategy for the City of Winnipeg.

Resources, Education and Skills Development

In order to make the transition to sustainable and organic farming, adequate resources, skills and training will be required for farmers and rural communities. The Agriculture Renewal Alliance (ARA) emphasizes that governments must provide extension services to rural communities that provide unbiased support for local enterprises, which facilitate the creation of formal and non-formal alliances. The ARA adds that farmers, "must get off the technology treadmill; while not turning their backs on technology, farmers must focus on improving the pool of knowledge from which they can draw rather than uninformed acceptance of new and costly measures." (Agriculture Renewal Alliance, 2000)

Halweil (2002) cites a British government commission that identified substantial business opportunities in the local foods sector, but noted that the main barriers to developing a local food business were the lack of technical knowledge about growing new crops or a more complex crop mix, food processing, and business and marketing.

Currently, Manitoba Agriculture, Food and Rural Initiatives, with a workforce of over 650 full time equivalent staff, has only one person listed as an organic agriculture specialist. Manitoba's extension services provides a wide variety of services ranging from financial planning and crisis management to business planning and on-farm diversification, as well as having significant geographical scope. However, Manitoba

Agriculture, Food and Rural Initiatives underlying focus is currently orientated to Manitoba's agriculture policy, Destination 2010 and to some extent, the Agricultural Policy Framework.

The Manitoba Organic Report, (Weurch et al, 2002) identified "organic producers' lack of marketing knowledge and regulations needed to sell to retailers" as a weakness in Manitoba's organic sector. The report found that, "Many producers are not trained in pricing, packaging, transporting, negotiating, selling and marketing of their products (p 35)." Another weakness identified in this report was the need for an organized distribution system from local producer to retailer.

Quebec's strategic plan for the organic sector (2004-2009) echoes these challenges whereby two of the five main challenges identified in Quebec included the need to develop local and regional marketing structures and the requirement to increase professional and technical support for established and transitional organic firms. Quebec's strategic plan offers various solutions to address these challenges Filiere biologique du Quebec, 2003).

The Agriculture Renewal Alliance (2000) summarizes their 2000 Conference by concluding that as well as having wealth in sustainability, control, diversity and forming alliances, there is wealth in knowledge. "Farmers, not production, will fuel agricultural renewal. The vitality, creativity, resourcefulness of farmers - are the engines of the future. Knowledge, inasmuch as it is an investment in people rather than machines and technology, empower farmers and allows them to achieve their full potential (p 2)."

McCrae (2003) suggests the program supports required to successfully move to organic farming include transition planning, conversion services, training programs and mentoring systems. Locally, the Assiniboine Community College has recently filled some of the void by offering organic agriculture in its curriculum. The Organic Producers Association of Manitoba has also launched a mentoring program to assist those who wish to make the transition.

To move towards sustainable and organic farming and food systems, adequate financial investment will be required. In times of government cut backs and program withdrawals, the expanding sustainable and organic agriculture sectors will feel these pressures. One solution would be to divert the massive subsidy and incentive programs offered to the specialized conventional agriculture systems for export purposes, to sustainable and organic agriculture. Quebec's strategic plan highlights the funding crunch felt there, which has become a common issue across the country.

"The Quebec and federal governments are increasingly emphasizing health and environment issues. Surprisingly, the organic sector, which provides undisputed benefits to society in both areas, does not benefit from policies promoting its development or from more substantial funding programs. This seemingly contradictory situation suggests that the links between health, the environment and organic agriculture are still not obvious enough to governments to induce them to invest more in the sector's development" (Filiere biologique du Quebec, 2003).

A 2002 cross Canada survey (Macey 2004) on the state of organic agriculture farming reveals that Manitoba has a long path ahead. With slightly over 200 organic producers certified, this represents a mere one per cent of total farms in Manitoba that are certified. This ranks Manitoba near the bottom in Canada with having the least percentage of total farms that are certified organic. At 2.3 percent, Saskatchewan can

boast as having the highest percentage of certified organic farms in Canada (Macey 2004).

Agriculture Policy Framework

With its emphasis on the global market and “Branding Canada,” the Agriculture Policy Framework may potentially offer some limited opportunities for moving towards sustainable agriculture and in particular, organic farming.

The Agriculture Policy Framework will spend \$31 million over five years for agriculture renewal. Renewal is defined as a process, which will help farmers increase their profitability, diversify their incomes, find new market opportunities, learn new skills, transfer farm assets and enter into farming as a career. Manitoba’s contribution of \$20 million, involves existing programs through its rural extension service for farm management, home economics, agriculture representatives, and crop and livestock diversification. Other Manitoba existing programs offered includes, “Project 2000 – Mentoring and Your Future in Farming” and the “Managing Risk Education Program.”

Canada’s contribution of \$11 million focuses on three main programs, “Canadian Farm Business Advisory Service,” the “Canadian Skills Development Initiative” and the “Agricultural Enterprise Program.” All three federal programs are designed to complement existing renewal programs offered by Manitoba.

The Skills Development Initiative and Agricultural Enterprise Program are the two most likely programs, which could potentially assist farming families to make a transition to production for the local and regional market. These two programs would enable farms to diversify their family income by developing new business opportunities such as direct marketing, selling up the food chain with small scale processing, and moving into niche markets such as organic production.

Other potential opportunities may include the environmental farm plan program. With \$32 million available for this program over the next five years, it is quite feasible that family farms can be adequately compensated for making the transition to sustainable and organic farming. Program details and eligibility have not been finalized, but it appears that any farm operation can qualify for funding through the implementation of beneficial management practices (BMP’s). According to MAFRI, (per com Schellenberg, June 2004) some 30 BMP’s have been identified that will allow farm operators to qualify for a maximum pay-out of \$30,000 over the life of the APF. Examples of BMP’s identified include, manure and nutrient management techniques, riparian protection, soil erosion control, runoff control, improved pest management, and wildlife and biodiversity protection. It is anticipated that a third party organization, such as the Farm Stewardship Association of Manitoba, will be administering the environmental farm plan program and it is expected farm plan certifiers will be contracted through this organization.

Much like Destination 2010, the APF does not define “sustainable agriculture” however, the implementation agreement does include targets which must be achieved in Manitoba by 2008. These targets are as follows:

- 12 percent reduction of residual nitrogen on provincial farmland
- 16 percent reduction of the average rate of water erosion
- 373 percent increase in the annual change in agricultural soil carbon
- 22 percent reduction in agricultural greenhouse gas emissions

- 5 percent increase in total agricultural habitat availability index

Considering that Manitoba's agriculture policy favours conventional agriculture systems and is bound to the export philosophy, it is anticipated that most of the environmental funding will be allocated to the status quo in Manitoba, meaning large-scaled specialized farm systems producing grains, oilseeds, pigs, cattle and potatoes. For the highly intensified livestock sector, it is expected that a good portion of this funding will be allocated mostly for technological fixes.

At Manitoba's first ever food security conference, Rod MacRae summarizes the APF as "representing the most significant opportunity in some time for the organic farming sector to advance a comprehensive research and policy agenda, and that success will depend on a thorough analysis of the APF, the policy actors involved in its development, and the vulnerabilities of its implementation" (MacRae, 2003).

RECOMMENDATIONS

The following section outlines recommendations that have emerged from the research that may assist in the creation of an equal playing field for small scale agriculture and alternative food systems.

1. Manitoba should endorse Canada's Action Plan for Food Security and also develop a provincial food policy, which places greater emphasis on food self-reliance and sustainable food production systems. This food policy can be aided by:

The engagement of the public and other stakeholders through the creation of a task force and a committee in cabinet.

Developing food policies within local government planning schemes (ie, Plan Winnipeg, Brandon and District Area Planning District) which promotes the local food economy should be encouraged. This can include the development of an urban agriculture strategy for Brandon and Winnipeg.

Developing procurement policies and laws, which favour local foods and local food companies. (This may require amendments to the Internal Agreement on Trade)

Developing tax and zoning policies within local governments, which encourage initiatives such as small-scale food processing industries and community gardens.

Manitoba should keep better track of its food economy. Proper policy development and market intelligence must include a detailed analysis of the flow of food in and out of the province. Detailed data, such as imported food items entering the province from various jurisdictions – internationally and inter-provincially were difficult to obtain or are not publicly available. MAFRI provides limited analysis on Manitoba's restaurant and food service sector, food wholesale sector, fish and seafood sector, and food retail sector. It would be difficult to develop a meaningful provincial food and agriculture policy without having accurate data as to who the players are, where the food is coming from and who controls what in the market.

2. Any future renewal of another Agriculture Policy Framework must place greater emphasis on sustainable agriculture, organic agriculture, local food systems, on-farm diversification and financially favor small to medium-scaled family farming enterprises.

Manitoba should build on its first organic report of 2002 and develop and implement a strategic plan of action for organic agriculture in the province. Adequate resources, human and financial, will be required for the development and implementation of this plan.

3. Manitoba should adhere to its current policy and law, whereby the Sustainable Development Act and Financial Management Guidelines calls for the government to perform a sustainability impact assessment for major agricultural projects it assists.

Alternatively, the Manitoba Bureau of Statistics should at a minimum perform a benefit/cost analysis of such major projects. Both options should include public participation and full cost accounting.

Current government program funding, subsidies, human resource allocations, training programs, education programs, outreach and research support within Manitoba Agriculture, Food and Rural Initiatives must shift towards local food systems, sustainable agriculture, and organic production. Funding and support can be directed towards:

- Transition and mentoring programs for sustainable and organic agriculture.
- On farm diversification strategies such as direct marketing, on-farm processing, agri-tourism, greenhouse production and agri-farm teaching.
- Training and grant programs for local small-scale, food processing businesses such as meat cutters, butchers and abattoirs.
- Reorientation of research, training and education programming offered through universities, colleges and technical schools.
- Cooperative development and partnership marketing schemes
- Implementing and supporting a “buy local” food campaign

New policy initiatives and new funding sources that support a local food economy and sustainable agricultural production can be achieved by tax regime based on a polluter pays principle. This type of strategy has the potential to allow sustainable agriculture to use its competitive advantage.

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APPENDIX A: METHODOLOGY

Community Shared Agriculture

Community Shared Agriculture research included key document review, key informant interviews, in-depth interviews, phone interviews, and self-administered consumer surveys. In total 14 farmers on nine CSA farms were interviewed.

Current CSA Producers

Current CSA producers were identified through Internet searches, key informant interviews, CSA listings, previous research, and snowball sampling. Questions were designed based on developing an understanding of the scale and history of the CSA enterprises, motivations for establishing a CSA, economics and contributions to livelihoods, and barriers and opportunities of the model (see Appendices C, D, E, and F for survey instruments).

CSA producers were interviewed in the fall of 2003. In-depth interviews were conducted with nine farmers from four operating CSAs. Two interviews were conducted on farm, a third off-farm and a fourth both on and off-farm. Notes were taken throughout the interviews, and where conditions were appropriate interviews were recorded.

For the three interviews that took place on-farm, where possible, the researcher provided volunteer labour in the running of the CSA. Activities included harvesting, packing sharer boxes, pest control, and food box distribution. Immediately following each interview additional notes were recorded and data was reviewed with additional points added for clarification. Handwritten interview notes and audio recordings were later transcribed to a computer. Data was then grouped and coded for analysis.

Copies of transcribed grouped interviews were sent to the CSA farmers. This served to verify collected data and to ensure the comfort of the participants due to low population numbers of CSAs in Manitoba, the personal and financial nature of the data being collected, and the potential for lack of anonymity. With the exception of several small clarifications, data was found to be accurate and acceptable to the CSA producers.

Former CSA Producers

Former CSA producers were identified through snowball sampling, CSA listings (Ecological Farmer's Association 1995, and Beeman and Rowley, 1994), pre-existing research (Kaktins, 1997), and Internet searches.

Former producers were contacted by telephone in January 2004, asked if they would be interested in participating in the study, and where necessary an interview time was scheduled. Phone interviews were conducted with five former CSA farmers and were between 20 minutes and one hour in duration.

Consumer Questions

Draft CSA surveys questions were developed after consulting existing surveys. The objectives of the surveys were to gain an understanding of consumer motivations for joining a CSA, membership impact, food choices, farm involvement, barriers and opportunities, and consumer demographics. Farmers previewed a draft survey and had an opportunity to alter and add questions prior to dissemination. Self-administered member surveys were conducted at only two CSA farms as a third farm was phasing CSA out of its operation. Results from a pre-existing phone survey provided data on an additional 63 members from a fourth CSA.

Farmers' Markets

Farmers' market research included key informant interviews, phone interviews with Market Coordinators or Market Presidents, self-administered vendor surveys, and administered farmers' market consumer surveys.

Survey Design

Surveys from Ontario (Cummings, Kora and Murray, 1998), Alberta (Alberta Farmers' Market Association, 2002), a USDA national survey (United States Department of Agriculture, 2002), and Oklahoma (Kerr Centre for Sustainable Agriculture, 2001) were consulted prior to designing the survey.

Farmers' Market Coordinators and Home Economists with Manitoba Agriculture and Food were asked what questions they would like to ask fellow vendors or customers. In addition, as most Market Coordinators are also vendors, their interviews provided an opportunity to identify what types of questions were most appropriate, when survey distribution was most convenient and other broad parameters for the survey.

Key Informant Interviews

Key informant interviews were conducted with the former coordinator of the Manitoba Farmers' Marketing Association and two previous committee members, three employees of Manitoba Agriculture and Food, one employee of Agriculture Canada, two chefs at local restaurants, two local retailers, and two individuals involved with direct marketing and local buying in Manitoba.

Farmers' Market Coordinator Interviews

All 19 markets that were listed with Manitoba Agriculture and Food were contacted (Manitoba Agriculture Food and Rural Initiatives, 2003, 2002). Markets listed follow a "make it, bake it, or grow it" policy, comply with existing health regulations, and do not allow second-hand goods. The listed contact (either the Market President or Market Coordinator) for each market was contacted by telephone to schedule an appointment, and then contacted the following week for a one hour phone interview. Several respondents were not available at scheduled interview times and so alternate dates were arranged.

Questions for Market Coordinators were developed following a review of key documents including existing surveys from Alberta and the United States. These surveys were examined to ascertain existing farmers' market structure and potential challenges that markets face. Market Coordinators willingness and ability to assist in vendor survey administration was ascertained as was the interest in allowing consumer surveys to be conducted at a future date.

Vendor Surveys

Survey's were designed to gain an in-depth understanding of motivations, operations, economics, barriers and opportunities, and demographics of participating households, scale of operations, and impacts on community. In addition, suggested questions from both Market Coordinators and Manitoba Agriculture staff were included.

Coordinators identified that an incentive would increase vendor survey return rates. Subsequently ballots for a raffle for a conference registration to the Manitoba Direct Farm Marketing Conference (provided by Manitoba Agriculture and Food Home Economists), and two Direct Farm Marketing books were provided for each completed survey. Draft surveys were developed and provided to two market vendors, a Home Economist, and two academics for feedback.

Initially farmers' market vendor research design involved providing administered surveys to a representative randomly selected group of vendors throughout the province. However, based on interviews with farmers' Market Coordinators the researcher determined that there was reluctance on the part of the Market Coordinators to disclose names or phone numbers of individual farmers' market vendors. While friendly and comfortable answering general questions about their markets, many Coordinators were guarded, particularly regarding market financial information. This is similar to findings of the *Alberta Farmers' Market Vendor and Consumer Profile* (2002) where 20 percent of vendors were leery of revealing financial information. Reasons could include the existence of the markets as an informal economy, and caution by Market Coordinators unwilling to jeopardize their relationship with existing vendors.

The inability to obtain contact information and reluctance of participants to disclose personal data provided challenges to researcher's ability to randomly sample vendors and administer the surveys. The most anonymous method for the vendors was a sample of all vendors in the province with surveys distributed through the Market Coordinators. It was hoped that this approach would also increase survey response rates.

An instruction sheet, consent form, surveys, survey envelopes, and ballot forms were mailed to Market Coordinators. Coordinators were requested to distribute surveys, collect them the following week, and mail the surveys back using return postage and address labels provided. Ballots for the raffle were kept separate from individual survey responses.

Coordinators were contacted the day after the packages were mailed to inform them to expect the surveys, and approximately two weeks later to ensure that surveys had been distributed and that sufficient numbers of surveys were included. Coordinators from markets that had not returned surveys were contacted by phone at six weeks after survey mailing. Following receipt of returned surveys all key informants and participating Market Coordinators received "thank you" cards containing expected completion dates of the final report.

Consumer surveys

Consumer surveys were developed after an examination of previous research, as mentioned in section 4.2.2. Questions were designed in order to develop an understanding of consumer motivations, impact, barriers and opportunities, shopping patterns, economic impact, and demographics. Consumer surveys were pre-tested twice, once at an urban market and once at a rural market.

Given available financial and human resources it was not feasible to survey all consumers at all farmers' markets in Manitoba, nor was it feasible to survey a representative sample. Instead, the number of markets that could be surveyed was determined by the availability of a local volunteer employee or summer student from Manitoba Agriculture. Surveys were limited by the time-frame of a single market day.

The primary researcher, staff, summer students, and Home Economists from Manitoba Agriculture and Food, and a paid University student in Brandon, assisted in administering consumer surveys. Surveyors were sent an instruction sheet, consent forms, and surveys. It was anticipated that in some of the rural markets surveyors would know the majority of respondents and would be uncomfortable requesting household income information. Where appropriate surveyors were instructed to use digression in administering this question with the option of omission.

Data Analysis

Post-collection data (audio tapes, written transcripts, computer files etc.) was stored in password protected computer files or a locked facility. Interview data was transcribed by the researcher and common or diverging themes between cases and individual interviewees were identified, coded and analysed. Numerical and tabular analysis was utilised. Survey results were analyzed using coding and quantitative techniques including statistics where appropriate. Data was entered in SPSS and descriptive statistics were used to draw out themes from the data.

APPENDIX B: PROFILE OF MANITOBA CSAs

Existing Manitoba CSAs

	Farm 1	Farm 2	Farm 3	Farm 4
Type of farm	Family farm	Workers coop	Family farm	Family farm
Motivation for trying CSA	Philosophy, livelihood choice and financial capital	Human capital and philosophy	Philosophy, livelihood choice and financial capital	livelihood choice, financial capital, and philosophy
Land	10 acres Own land	4 acres Donated use of land	2 acres Own land	3 acres Own land
Share #s	95	248	20	4
Farmers f/t = full time p/t = part time in growing season	2 f/t family farmers 2 f/t apprentice farmers 1 p/t farmer Volunteers(Few) Community group	1 f/t farm manager 4 f/t farm labourers	2 f/t farmer Volunteers 3 sharers Youth volunteers Woofers	1 f/t farmer 1 p/t farmer Occasional family help Woofers
Off farm income	Both family farmers have part time off farm jobs	Main farmer	Retired	Farmer spouse has off farm job
Type of farm	Vegetable Livestock for family Some Fruit	Vegetable	Vegetable Some fruit	Mixed livestock, forage, market garden
Distance from sharers	15 km	20 km	10 km	45 km
Future	Operate with additional involvement of non family farmers	Increase number of shares and move closer location	Taking year off and seeking farmer to grow for members	Phasing out

DETAILED PROFILE OF FARM #1

	Farm #1
Currently operating	Yes
Years operating	1992-1994, 1999-2003
Type of farm	Vegetable with livestock production for family
Acres	10 acres, owned
Location	20 minutes from sharers
Farmers	2 f/t family farmers (MF) 2 f/t apprentice farmers 1 p/t farmer
Sharers	Now: 95 Max: 200 Next year: undecided, Future: Let others take over farm
Sharer return rate	50%
Share price	Full: \$325, \$300 if pick up at farm Half: N/A
How establish share price	Farmers' market prices
Cost/week: 13 weeks full share	\$25
Share includes	Produce
Option to buy	Bulk winter vegetables
Organic	Yes
Certified organic	Yes
Demand	Waiting list
Why farm	Enjoy Break from office work Believe it is important: faith based Share farm with community
Challenges	Labour
Working shares	Now: unofficially Tried but no one fulfilled
Opportunities	Processing Develop store shares Community involvement Additional farmer's markets
Increase scale, hire additional labour	Yes, 2.5 additional farmers
2004 Gross income	\$28,000
Hourly rate	Based on \$5/hr, 40 hr week
Direct marketing	3 farmers' markets Retail to some stores
Community connection	Good Food Club Food Donations

DETAILED PROFILE OF FARM #2

	Farm #2
Currently operating	Yes
Years operating	1990-2004
Type of farm	Vegetable and herb
Acres	4 (land used no rent)
Location	1 hour from sharers (80-100 km)
Farmers	5
Sharers	Max: 325 single shares Current: 248 Next year: 260 Future: More
Sharer return rate	30%
Share price	Full: \$ 260 Half: \$140
How establish share price	Historical precedent
Cost/week: 13 weeks full share	\$20
Share includes	Produce
Option to buy	Bulk winter vegetables
Organic	Yes
Certified organic	Yes
Demand	Not enough?
Why farm	Non profit linked to interfaith Immigration council Provide new Manitoban's with fair wages for their agricultural products while providing sustainably produced local food
What do you use the income for	Non profit
Why stop farming	N/A
Challenges	Paying for labour Share prices Transportation (distance from city) Board has non-profit, socially oriented motivations and this makes it difficult to run the co-op as a business Reliance on grant money Consumer awareness

	Balancing CSA and wholesale. To make money on wholesale without taking from sharers
Working shares	Tried and no one comes Training new each shift Availability (hours and blocks of time not correspond with need) Easier to charge shares
Opportunities	Raising share prices Wholesale Farmers collectively selling to grocery stores
Increase scale and hire additional labour	Labour is 1 person per acre Increase wholesale rather than increase shares
2004 Gross income	Loss
Hourly rate	\$9 labour?
Direct marketing	CSA members can get same veg weekly and wider variety Wholesale is a higher price on a few vegetables Most stores buy small quantities Wholesale easier labour wise b/c en mass picking not packing individual boxes Wholesale need scale and estimates of what will be ready when at least a week in advance
Community Connection	Food Donations
Notes	
Use internet for CSA?	Starting to

DETAILED PROFILE OF FARM #3

	Farm #3
Currently operating	Yes
Years operating	1993-2003
Type of farm	Vegetable Partner with another farming couple
Location	5 km from sharers
Share price	Full: \$310 Half: \$210
Sharers	Max: 36 Current:20 Next year: take a year off Future: Hand over?
How establish share price	Grocery store prices and then take a higher price Keep an eye on FM prices
Weeks	12-14
Share Cost/week: 13 weeks full share	\$23.80
Share includes	Produce and some berries
Organic	Yes
Certified organic	No, could be
Demand	Waiting list
Why farm	Believe it's important "Even though money is certainly important to us, however it's not the main reason we do it. We could go and get part time jobs and earn a whole lot more money per hour then we do doing this."
Challenges	Frantic rush at the beginning of each farmer's market Limited amount of money for your time Labour intensive
Working shares	No but 3 regular volunteers (15-20% of sharers)
Opportunities	Community Aspect Handing over Retirement
Increase scale and hire additional labour	No: Do not have the energy to scale up
2004 Gross income	\$7950
Hourly rate	"We don't want to know how much we make per hour" Labour is not included in pricing
Direct marketing	FM, more flexible if you don't want to do it one week

	<p>however can't count on demand</p> <p>Enjoys connecting with members via CSA which doesn't happen at FM</p> <p>"I didn't want to get involved in taking things to stores"</p>
Community Connection	<p>Group home</p> <p>Food Donations</p>

PROFILE OF FORMER MANITOBA CSAs

Farmer Number	Motivation for CSA farming	Dates operating	Average Sharers	Land acres	Share price	Why stopped	Off-farm Job
5	Lifestyle Philosophical	1991-1995	28	2	Lg: 265 Med: 200 Sm: 125	Weather Flood	No
6	Income	1993	20	2.5	120-150	Low income Labour	No
7	Excess produce	1997-1999	10	2.25	525 for full 375 half	Income Labour Customer attitude	Partner worked
8	Excess produce Philosophical	1993-1997	10	15	200-400 (large shares)	Flood	Partner worked
9	Income	1994-1995	75	N/A	N/A	Consumer complaints Labour Low income	No
10	Philosophical	1996	<50	N/A	N/A	lack of Consumer participation Labour Low income	Partner worked
11	N/A	1993	8	5 acres	200	N/A	N/A
12	N/A	1995	N/A		N/A	N/A	N/A

APPENDIX C: CONSUMER MOTIVATIONS FOR CSA INVOLVEMENT

CONSUMER MOTIVATIONS FOR JOINING A CSA

Rank	Farm#1 (n=50)	Percent	Farm#3 (n=18)	Percent
1	Get Fresh Produce	34	Get Fresh Produce	63
	Want to Support local Farmer	21	Health concerns	12
	Want to eat local produce	15	Environmental concerns	12
2	Want to eat local produce	26	Want to eat local produce	35
	Want to support local Farmer	21	Health concerns	18
	Get fresh produce	15	Get fresh produce	13
3	Support local Farmer	19	Support local farmer/ Environmental concerns	22
	Environmental concerns/cheaper Access to organic produce	17	Health concerns	18
	Get Fresh produce	11	Know where/how food is grown	12
4	Environmental concerns	23	Environmental concerns	24
	Want to eat local produce	17	Support Local farmer/ Support a sense of community/Want to know local farmer	18
	Want to support local farmer	13	Get Fresh produce	13
5	Health	17.0	Support local Farmer	23.5
	Support a sense of community	12	Know where/how food is grown Eat local	18
	Eat local food/ Environmental concerns	11	Support a sense of community	12

APPENDIX D: FARMERS MARKETING ADVICE

These Farmers Market tips were compiled from responses submitted by Manitoba Farmers' Market vendors and consumers

Working With Customers

Be friendly

Ask for product feedback (helps improve!!)

Be willing to accept criticism

Choice: customers enjoy choice and variety

Cleanliness

Clear labelling and list ingredients

Consistent quality

Attend market regularly

Be professional

Use Business cards

Promote consumer awareness: industrial agriculture, monocropping, benefits of small organic production

Be interested and interesting when talking to customers

Ask customers them what they are looking for

Talk to your customers and get to know them

Ensure you deliver what you promise

Feedback: ask for it and be open to constructive criticism

Be Flexible

Give samples

Manners never go out of style

Honesty

Refer customers to other vendors: it will come back to you

Respect customers

Same spot

Smile

Working With Other Vendors

Cooperation

Be friendly (and don't think the other guy is out to get you even though he probably is)

Careful sharing performance/production methods: others copy you

Interact with others

Know what other vendors sell so you can promote

Miscellaneous

Start small

Study markets and choose the best one for your product

Try new ideas and products

Use as few additives and pesticides as possible

Use primary colours for stand: table cloth, umbrella, baskets

Variety of products

Wear clothes that reflect your product

Word of mouth advertising is best

Attend direct marketing conference

Don't fear work, be a steady vendor and take pride in you work

Don't get discouraged

Don't start with the expectation of easy money because it isn't

Enjoy products

Enjoy what you do

Give up your summers

Hard way to supplement a farmer's income

Have fun

If you are out to make a living forget it

Need excellent product

Long hours

Low pay

Niche: find it

Originality

Packaging: attractive and tidy

Patient

Pay yourself adequately

Persist

Be Prepared

Price: don't overprice

Price: don't undersell yourself

Product: consistent, good value high quality

Products: believe in them

Vendor Suggestions For Market Improvement Opportunities

Make market stand out in the community: ready food, music, entertainment, children's activities

Promote harmony among vendors

Crowd control:

Cover vendors tables with inexpensive white cotton until market start time

Use ropes and a cowbell

Take pre-orders so that people know they will get their products

- Promote the market in all other areas where you sell
- Promote this method of marketing at business and community centers
- Customer seating
- Don't sell flea market or garage sale items
- Good signage
- Have entertainment
- Make it a family event
- Have coffee and food
- Bus tours for seniors
- Advertise
- What's available at the market this week
- Consistent vendors and location make for a stable market
- Choose the location carefully
- Encourage seniors
- Encourage younger customers
- Make the market a family event: ice cream vendor
- Go easy on the rules
- Have the market indoors
- Raffles for customers

Consumer Suggestions For Market Improvement Opportunities

- Crowd control
- Less bugs
- A shelter for the market
- More farm products
- Increased hours
- Different Location
- Concrete for the site
- Flowers
- Seating
- More signage
- Coffee
- Music
- Additional lighting
- Breakfast
- Parking facilities
- Samples

Suggestions for attracting vendors

- Steady repeat customers will bring vendors
- Ensure strong community support as you need profits to get vendors
- Avoid product duplication
- Communication with vendors

Keep them involved in decision making

Be flexible for vendors: don't have to have a seasonal membership
flexible table fees for those that sell more or less

Provide Canopies

Have a Coordinator who is friendly, positive, knows guidelines

Promote reality: there is money to be made but its'hard work

Run seminars for interested vendors

Send letters to vendors

Create an atmosphere where vendors have support and camaraderie

Vendors should involved themselves in administration and decision making