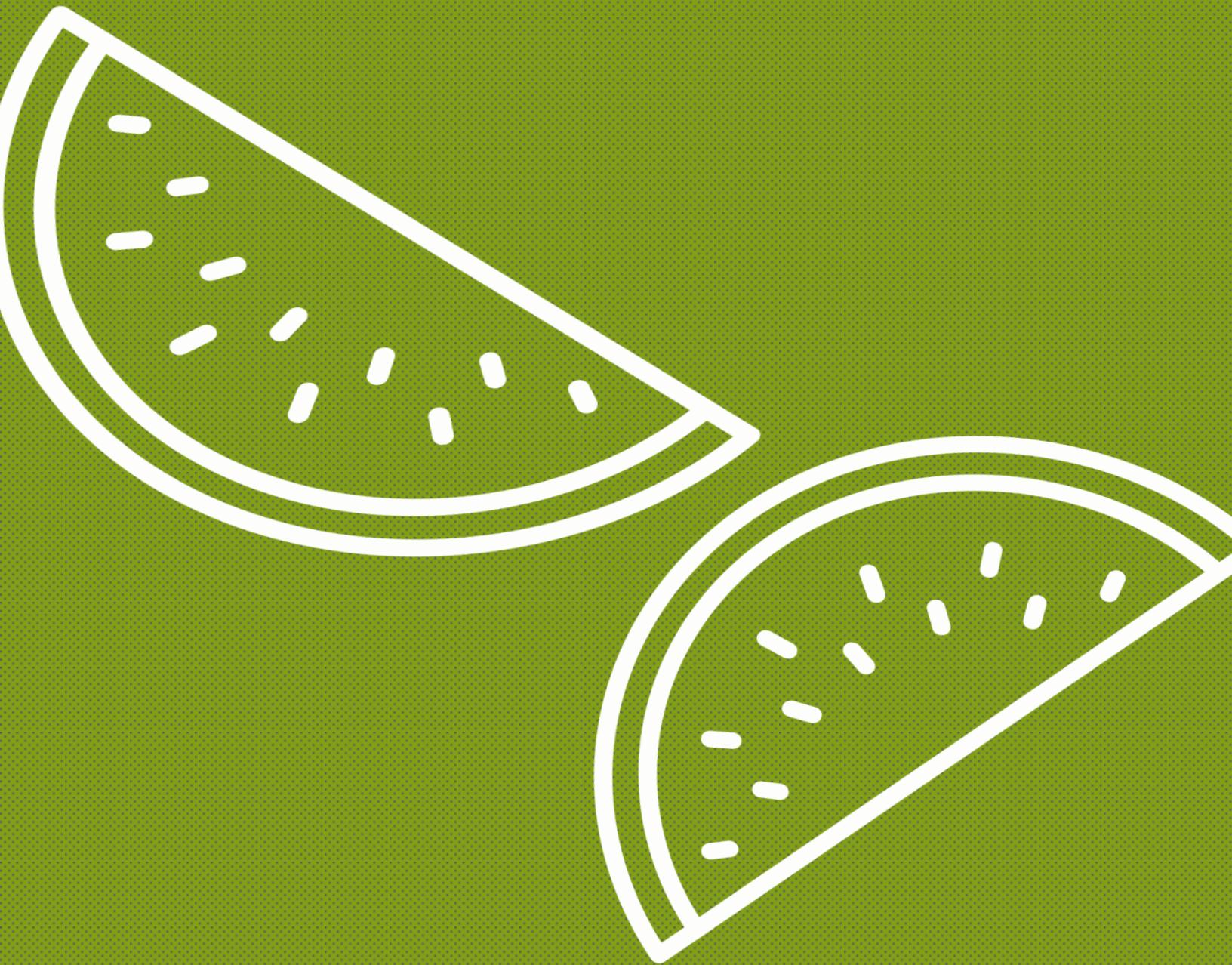


4.0 FOOD ACCESS AND DISTRIBUTION



4.0 FOOD ACCESS AND DISTRIBUTION

4.1 Findings

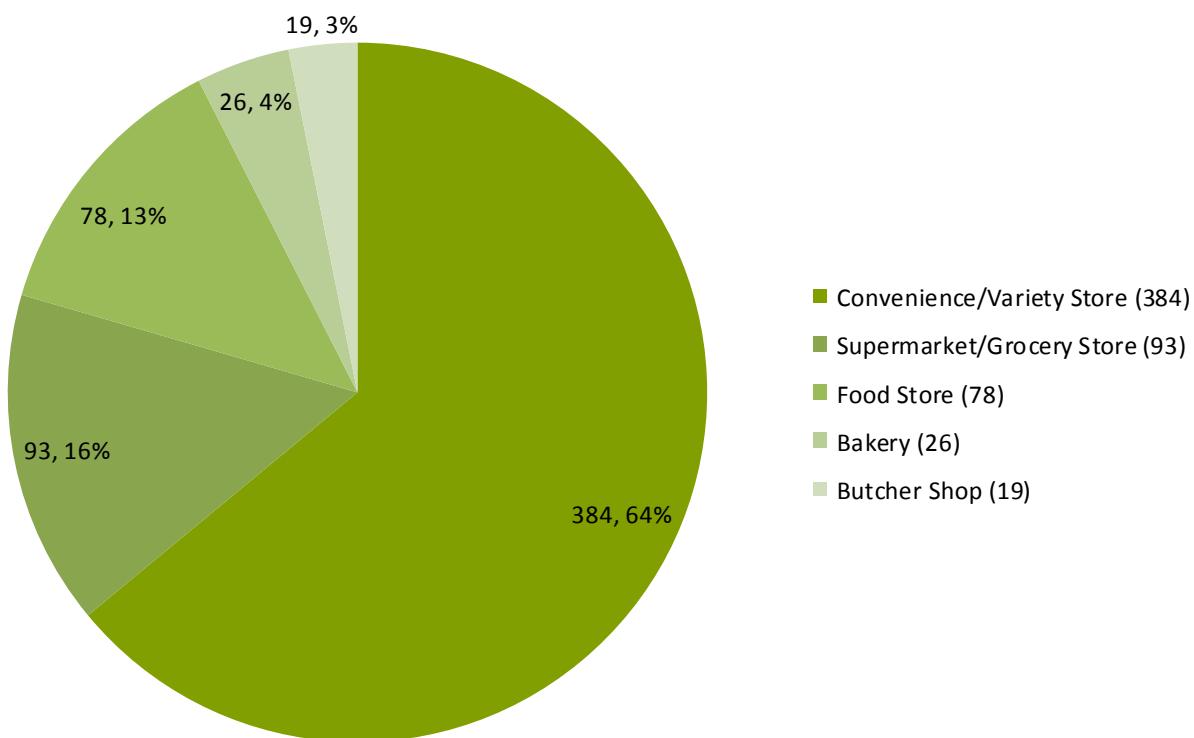
An overview of an area's food access points, at both the retail and service levels, alongside an account of food system stakeholders involved in distributing and processing food, can help to build a better understanding of both how and what kinds of foods are being accessed by the public in Middlesex-London.

The objectives of this section are:

- To provide an overview of food access points and availability of local food; and
- To provide an overview of the distribution system in the area.

This section explores the breadth of food access points in Middlesex-London, as well as the food distribution and processing activity in the area, by looking at who is selling, serving, distributing, and processing food. While existing evidence does not allow for conclusions to be drawn about how much local food is moving through these channels, the information collected can be used to inform further research into the availability of local food (see section 3) in the area.

Figure 31: Number and Percentage of Food Retailers by Type in Middlesex-London, 2015 (Middlesex-London Health Unit, Environmental Health Department)

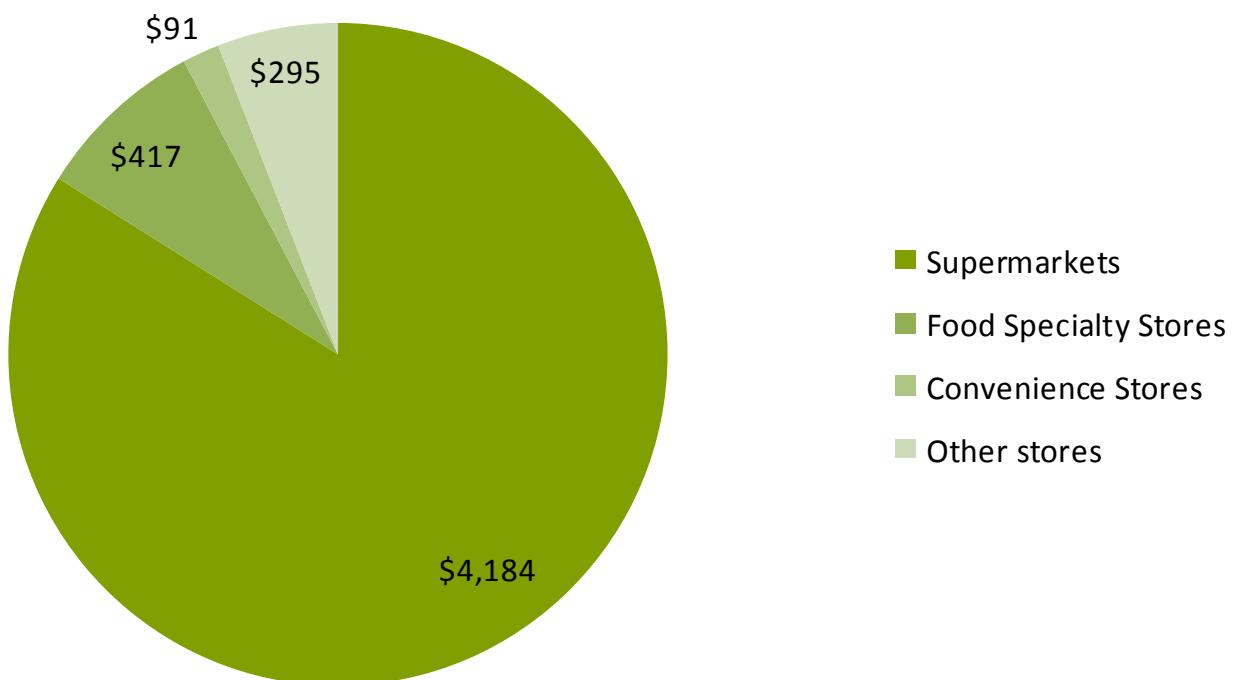


Food Retailers

The total number and type of food retailers in Middlesex-London (Figure 32) is an important indicator of where food can be accessed by people living in the area, and whether or not the food they are able to access is likely to be fresh, healthy, and coming from growers and producers in the area.

There are 600 access points for food in Middlesex-London; however, 384 of these access points (64%) are convenience or variety stores, and an additional 78 (13%) are categorized as food stores, which can range from nutrition, specialty, and health stores to gas bars and drug marts. There are an additional 26 bakeries and 19 butcher shops but combined these only make up a small percentage (7%) of the total food retailers in the area. An important group of food retailers to look more closely at are supermarkets and grocery stores. With 93 in Middlesex-London, supermarkets and grocery stores make up the second-largest percentage (16%) of the total food retailers. While their number is low in comparison to the total number of food retailers, data on household food expenditure at local stores underlines how important they are as access points for fresh healthy food (Figure 32).

Figure 32: Annual Household Food Expenditures in Middlesex-London, by Store Type (Source: PCensus, Food Expenditures Summary, 2014)



In 2014, the total annual food expenditure in Middlesex-London was \$1,441,544,617. This works out to \$7,427 per household. Of this total household food expenditure, 69% (\$5,156) of food was purchased from retail stores, and 97% of these purchases (or \$4,986) were made locally and on day trips. The remaining 31% (\$2,271) of food purchases were made at restaurants, 24% of which (\$1,808) was purchased locally and on day trips.⁷⁰ This means that the vast majority of food expenditure by Middlesex-London residents is made up of food purchased not only close to home but also from food retailers. As a result, these retailers are ideally positioned as potential agents of food system change that can be partnered with to increase local food consumption.

Of the \$4,986 that households in Middlesex-London spent in 2014 on food at local retail stores, they spent \$1,022 (20%) on meat, \$745 (15%) on dairy and eggs, \$745 (15%) on baked and other cereal products, \$594 (12%) on fruits and nuts, and \$506 (10%) on vegetables (Figure 33). According to the Consumer Price Index for Ontario, in November 2015 the price of fresh or frozen meat (excluding poultry) is significantly higher (62.7%) than in 2002. This price increase is almost twice the price increase of fresh fruit (32.8%) and slightly more than twice the price increase of fresh vegetables (31.1%).⁷¹ Considering that meat makes up 20% of the total household food expenditure at local retailers in Middlesex-London, decreasing meat consumption while increasing the consumption of both fresh fruits and vegetables can lead to significant cost savings, not to mention significant health benefits for residents, including decreasing their chances of developing dietary-related diseases.

⁷⁰ Statistics Canada, “Food Expenditure Survey, by Region,” 2014.

⁷¹ Statistics Canada, “Consumer Price Index, Food, by Province (Ontario), Monthly,” 2015, Web, at <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/cpis08g-eng.htm>.

Figure 33: Annual Household Food Expenditure by Category (Purchased Locally from Stores) in Middlesex-London (Source: PCensus, Food Expenditures Summary, 2014)



When relating the types of food purchased by households in Middlesex-London at stores locally (Figure 33) to the types of stores that these households purchase from (Figure 32) and the number of food retailers in the area (Figure 31), opportunities to use both primary and secondary food retailers present themselves. Even though there are hundreds of small food access points in Middlesex-London—including convenience, specialty, and other food stores—households spend the majority of their food budget (84% or \$4,184) at local supermarkets and grocery stores in Middlesex-London, which make up only 16% of the total food retailers in the area. This confirms that supermarkets and grocery stores remain the primary retail points for Middlesex-London residents to access fresh food. The price of food in supermarkets and grocery stores, in addition to the variety, standardized sizes, quantities and quality of food available are no doubt contributing factors to why they receive the majority of household food dollars. Additionally, a culture of both convenience and dependence has developed around

supermarkets and grocery stores that position them as primary food access points. As a result, an opportunity presents itself to work directly with larger retailers to increase their procurement, marketing and sales of fresh local fruit and vegetables can help to increase local food consumption and health at the household level. The second opportunity relates to the fact that there are a number of food access points, such as convenience and variety stores, which may be underutilized as channels to increase local food consumption. By working with these secondary food retailers to increase their procurement, marketing and sales of local food, residents in Middlesex-London will have increased opportunity to purchase fresh healthy food.

Alternative Food Retail Points

Public farmers' markets are another key access point for fresh local food. In Middlesex-London there are a number of farmers' markets (18) and the majority of these (12) are located in London. Of the total farmers' markets, 6 operate year-round while the remaining 12 operate seasonally. It is important to determine the number of market vendors at these farmers' markets that are actually farmers in the area because farmers' markets are a great place to connect consumers directly to the producers of their food. This type of relationship building can help to cultivate a local food culture, increase food literacy, and grow interest in the food and farming industries. Equally important information to collect includes: the amount and types of local food that farmers' market vendors are selling during peak growing seasons; how much of the food they are selling is produced by themselves; and what percentage of their total sales are farmers' markets sales. This data can help to determine how connected the start of the food supply chain is to alternative food access points, such as farmers' markets, as well as how important such access points are to the marketing of local food. For these reasons, gathering information on market vendors and tracking and tracing the products they sell at farmers' markets are key areas for further research.

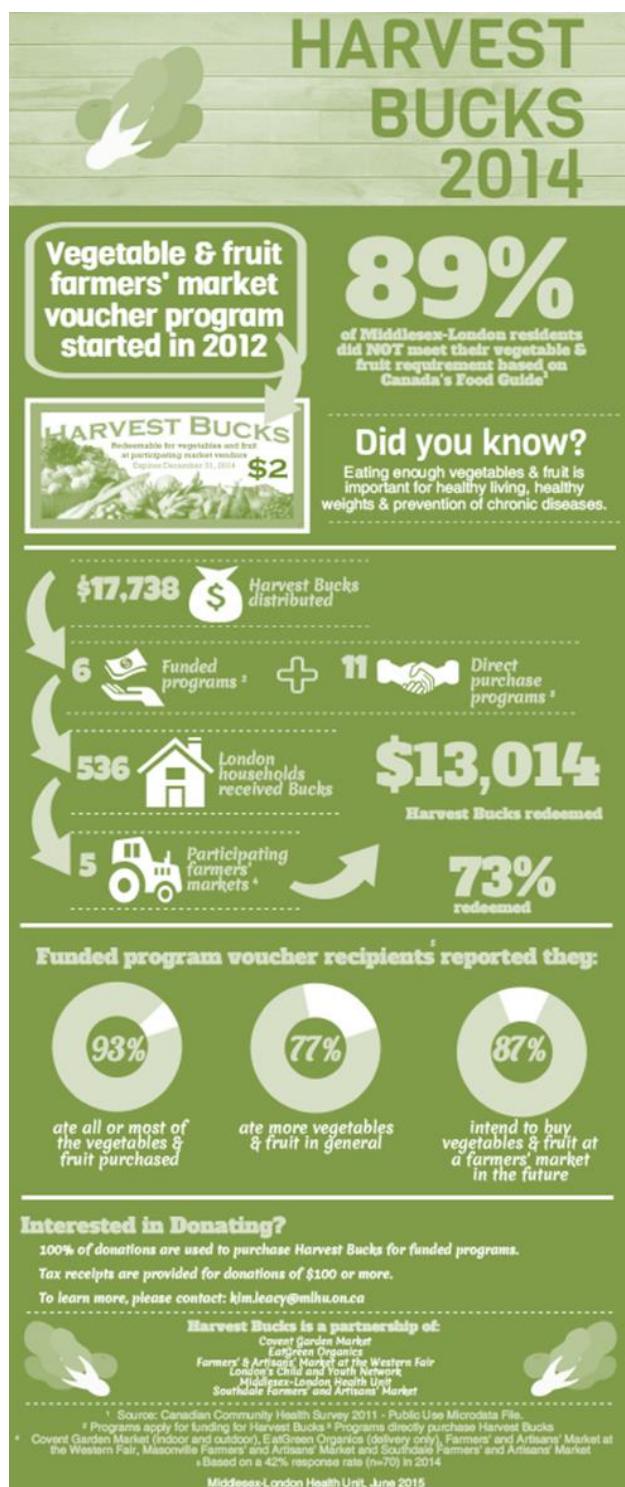
Since 2012 the Middlesex-London Health Unit has managed the Child and Youth Network's Harvest Bucks voucher program on behalf of a multi-stakeholder group. The program helps to improve access to local food—particularly for vulnerable populations—by providing vouchers (valued at \$2 each) that can be used at participating farmers' markets in London to purchase fresh vegetables and fruit.

The primary goals of the Harvest Bucks program include:

- Increasing access to and consumption of fresh vegetables and fruit;
- Increasing awareness and knowledge of, and comfort/familiarity with, farmer's markets and supporting local producers; and
- Increasing the comprehensiveness of local community-based food programming.⁷²

⁷² Middlesex London Health Unit, Harvest Bucks, June 2015, Web, at <http://www.healthunit.com/harvest-bucks>.

Figure 34: Harvest Bucks Impact, (Source: Middlesex-London Health Unit, 2014)



While both individuals and organizations can purchase Harvest Bucks directly, organizations running community programs can also apply for partially or fully-sponsored Harvest Bucks. 100% of financial donations made to the program are used to sponsor organizations applying for Harvest Bucks. In 2014, \$17,738 Harvest Bucks were distributed through 6 funded programs and 11 direct purchase programs, 358 London households received Harvest Bucks and 73% (\$13,014) of these were redeemed at 5 participating farmers' markets.⁷³ In 2015, four farmers' markets participated in the Harvest Bucks program, including: the Covent Garden Market, the Farmers' and Artisans' Market at the Western Fair, the Masonville Farmers' and Artisans' Market, and the Soho Market.

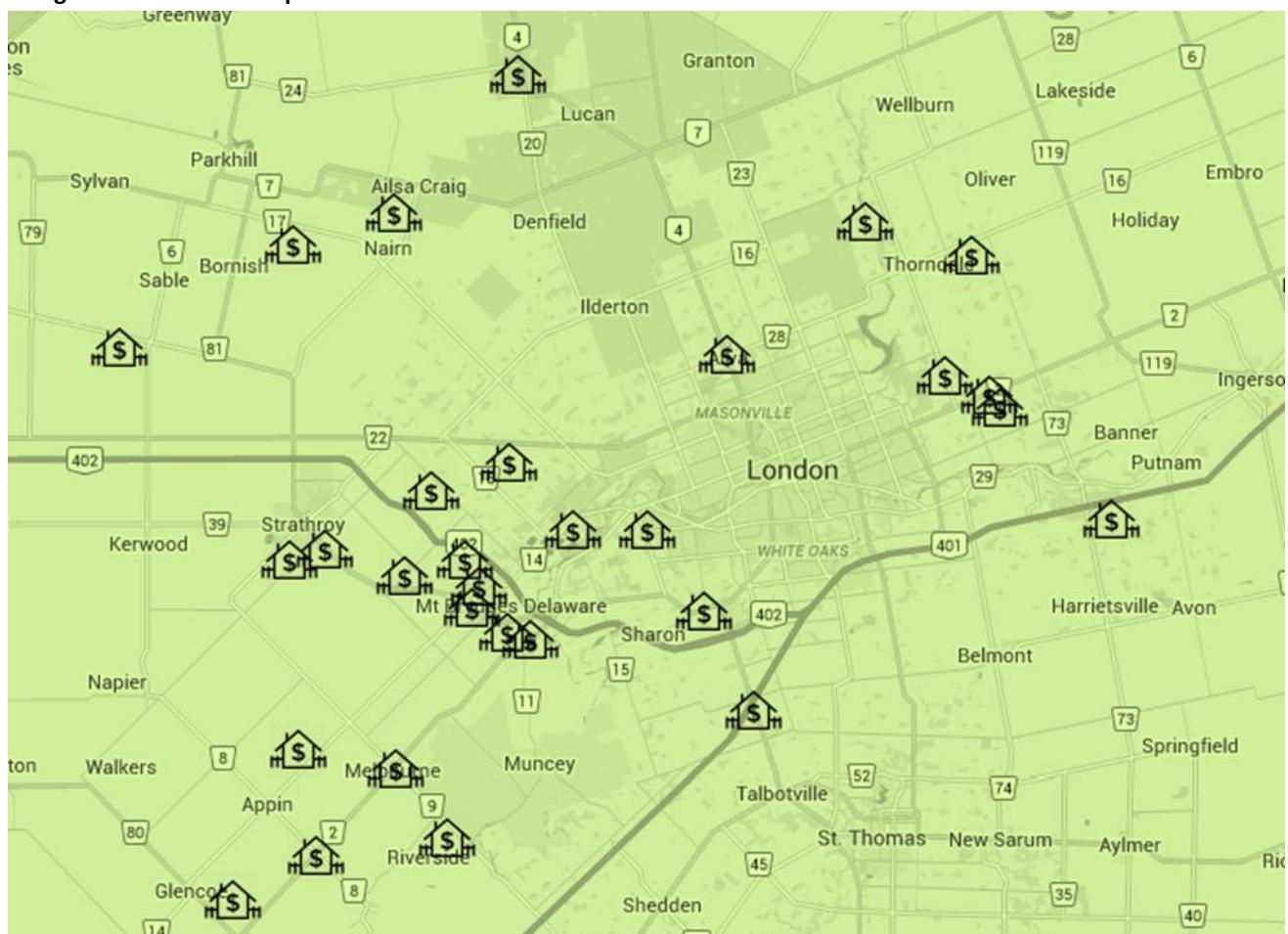
In addition to farmers' markets, Middlesex-London is dotted with farm gate retail operations (Figure 35), where consumers are invited to go directly to the farm to pick-your-own or purchase food that is harvested, grown, raised, or produced on the farm itself. In total, there are 30 farm gate retail operations, selling local food products. Some of these farm operations include food service as well, and have become ideal spaces for people to meet or host special events. Arrowwood Farm is one example of a farm that offers not only u-pick blueberries but also a beautiful space, called The Harvest Table, where parties can enjoy the catering and hospitality that sets this business apart. A great video of Arrowwood Farm & The Harvest Table is featured on the new Middlesex County website.⁷⁴ In consideration of the number of 1-69 acre farms located in Middlesex-London, of which there were 748 in 2011, there is much opportunity to grow the number of farm gate operations in the area by supporting farmers in carrying out both farm gate sales and other on-farm enterprise.⁷⁵

⁷³ Middlesex London Health Unit, Harvest Bucks, June 2015, Web, at <http://www.healthunit.com/harvest-bucks>.

⁷⁴ Middlesex County, "Business Profiles - Arrowwood Farm," Web, at <https://www.investinmiddlesex.ca/business-profiles/21>.

⁷⁵ See section 3.2 Food Production.

Figure 35: Farm Gate Operations in Middlesex-London



In contrast to the local seasonal food that one expects to find at the various farmers' markets and farm gates across the region, Middlesex-London has 30 recreational facilities where healthy food choices are limited. Recreational facilities in the area include ballparks, arenas, sportsplexes, community centres, and aquatic parks. These facilities are currently serving fast food options, including hotdogs, hamburgers, French fries, candy, pop, chips, and chocolate bars, as well as convenience foods from vending machines and concession stands. There is a real opportunity to support these facilities in developing their procurement and food service policies to include the purchasing and service of fresh healthy local foods. Recreational facilities are ideal examples of food system assets the community can leverage towards creating positive food system change; that is, the transformation of food access points traditionally associated with unhealthy food into local food service champions. Healthy Living Niagara's "Fuelling Healthy Bodies Pilot Project" is a great example of how this is happening in a region close to Middlesex-London.

Food Service

1452 different foodservice outlets span across Middlesex-London (Figure 37). Restaurants make up over half (54%) of the total number of these businesses and the second largest group (24%) is made up of take-out food establishments. The remaining 22% of foodservice outlets is made up of banquet facilities, cafeterias, snack bars or refreshment stands, cocktail bars, ice cream and yogurt vendors, and mobile food vendors. Due to the overwhelming number of restaurants (788) in Middlesex-London, in comparison to all other foodservice outlets, they should be considered as vital assets in future action planning. Restaurants are perfectly positioned to be intermediaries between local food producers and consumers because they interface with the public on a daily basis and communicate directly to the consumer through multiple channels, including in-person, menus and advertisements, social media and television activity.

One way to leverage the many restaurants in the area for food system change is to encourage them to become local food champions. One way to do this is to recognize existing champions for procuring local food and showcasing both the ingredients and the people behind them on their menus. This type of promotional activity has the potential to create a race-to-the-top that has significant economic impacts. However, it is important that any public recognition of a restaurant is credible. For example, the Ontario Culinary Tourism Alliance—a not-for-profit organization working towards showcasing the province's unique tastes of place—has developed a pan-provincial program called Feast ON (Figure 36). This program has a robust verification system that ensures participating restaurants meet specific criteria before benefiting from the marketing and promotion associated with becoming a "Certified Taste of Ontario." It also protects consumers who are interested in supporting local food businesses by verifying the dollars they are spending (while eating at restaurants) are being used to support local growers and producers.

Healthy Living Niagara – Fuelling Healthy Bodies Pilot Project

The Fuelling Healthy Bodies (FHB) program was an initiative undertaken by Healthy Living Niagara. Healthy Living Niagara is a partnership of community groups and individuals working to make the healthy choice an available choice. The program was test marketed in three arenas in the fall/winter 2013/2014...of which only one has extended the program. [However,] five new concessions joined in late 2014 bringing the total number of participating facilities, for 2014/2015, to six.

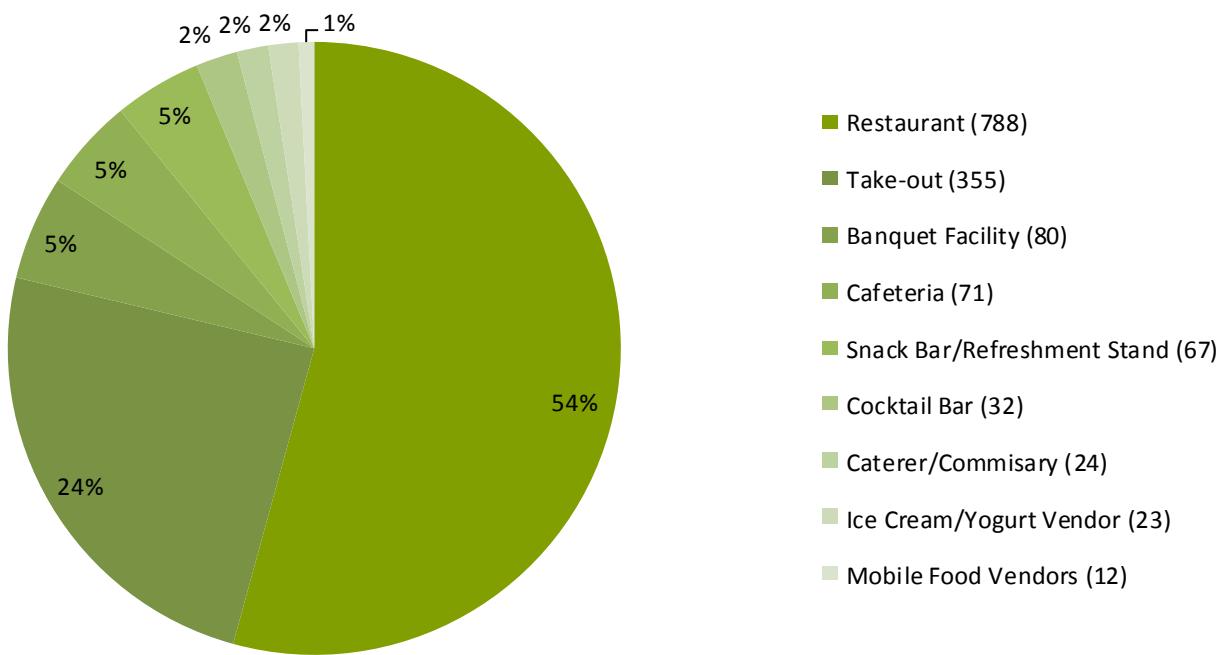
FHB aims to increase the availability of healthier food choices that meet the needs of arena and community centre patrons. The intention of this program is to improve the food environment. As arenas and community centres already support physical activity, they are perceived as a good environment to support healthy eating.

(Source: FHG International Inc., "Study to Evaluate Fuelling Healthy Bodies," Healthy Living Niagara, June 2, 2015).

Figure 36: Feast ON – Certified Taste of Ontario, About the Program (Source: Ontario Culinary Tourism Alliance, <https://feaston.ontarioculinary.com>)



Figure 37: Percentage and Number of Foodservice Outlets by Type in Middlesex-London, 2015 (Source: Middlesex-London Health Unit, Environmental Health Department)



Emergency Food Programming

When exploring access to food through a food service lens, the availability and accessibility of charitable food relief for people in need is important to consider. The City of London has 33 meal programs,⁷⁶ 17 food banks,⁷⁷ and 1 Good Food Box program.⁷⁸

The 33 meal programs, offering breakfast and/or lunch and dinner, are made available at 35 locations in the City.⁷⁹ Some programs (e.g. the Salvation Army program) have more than one location; therefore, the number of locations is greater than the number of programs. A “Help Yourself Through Hard Times” resource, created by Information London, divides the City of London into nine service location codes, in order to show the geographical location of each meal program. Table 20 shows the number of meal program locations by each service location code.

⁷⁶ Information London, Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014.

⁷⁷ Information London, Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014.

⁷⁸ The Food Box Project, Web, at <http://thefoodboxproject.com/>.

⁷⁹ Information London, Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014.

Table 20: Service Areas and Number of Meal Program Locations in London (Source: Information London, *Help Yourself Through Hard Times* Report)

Service Location Code (London)	Number of Meal Program Locations
Northwest	0
Northeast	4
Central	18
Southeast	2
Southwest	0
North	3
West	1
East	7
South	2

The geographical dispersion of meal program locations in London indicates that the majority of locations are in Central London (18 locations) and East London (7 locations).

Additionally, there are 17 Food Banks in London.⁸⁰ As with the meal programs, the London Food Banks are geographically divided between nine service location codes (Table 21). Many of these food banks have satellite locations; therefore, there are more locations than food bank programs.

Table 21: Service Areas and Number of Food Bank Locations in London (Source: Information London, *Help Yourself Through Hard Times* Report)

Service Location Code (London)	Number of Food Bank Locations
Northwest	3
Northeast	5
Central	3
Southeast	3
Southwest	0
North	1
West	1
East	3
South	5

The geographical dispersion of Food Banks in London shows that these services are concentrated in South and Northeast London. Southwest, North, and West London have only one or zero food banks for those in need. Collectively, the locations of both meal programs and food banks show that the majority of emergency food services are made available in South, Northeast, Central and East London, with very little made available in Southwest, North and West London.

⁸⁰ Information London, *Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014*.

While London has numerous meal programs and food bank locations, one must also consider their effectiveness. One way of determining the effectiveness of emergency food access points is by assessing the accessibility for the populations they serve. In London, all food bank locations are only available during specific hours of the day and limit the number of times individuals can pick up food items.⁸¹ For example, central food banks in London provide food items on an emergency basis, usually a one to three day supply, and are available for pick up once a month to once every three months. So while emergency food programs are available, the frequency by which individuals can participate in the programs is severely limited. It is also notable that only two of the 25 food banks are open on the weekends. With the exception of one food bank, there are no food bank locations that are open past 4:00pm on the weekdays. The exception, Youth Opportunities Unlimited, only offers food to youth ages 16-24 years old.⁸² These operational hours impact people particularly who work 9:00am-5:00pm jobs from Monday to Friday as they would have very limited ability to access food banks. In order to gain access to emergency food they would need to take time off work, which, in many cases, may not be a realistic option.

Looking at Middlesex County, excluding London, there are 4 food banks (Table 22), and 4 meal programs, although residents of Middlesex can attend some food banks and meal programs located in London.⁸³ The lack of transportation (see below) across the rural area severely limits rural populations access to meal programs and food banks offered in the City of London.

Table 22: Food Bank Locations in Middlesex-London, excluding London (Source: Information London, *Help Yourself Through Hard Times* Report)

Municipality of Middlesex-London	Number of Food Bank Locations
Strathroy	2
North Middlesex (commonly referred to as Ailsa Craig)	1
Southwest Middlesex	1

Access to Healthy Food for Children and Youth

Children and youth in Middlesex-London's education system are able to access fresh and healthy food through universal (open to all students) programs run by the Ontario Student Nutrition Program, a community-based and volunteer-driven provincial program that operates in Middlesex-London schools. All but one school (White Oaks Public School, which waives the \$0.25 daily fee if need be) run their nutrition programs free-of-cost to students. A portion of the cost (approx. \$1 per snack) to run these programs is subsidized by government funding (\$0.12-\$0.14 per snack) but the majority of costs (86-88%) are recovered through school fundraising activities and community partnerships. Following nutritional guidelines,

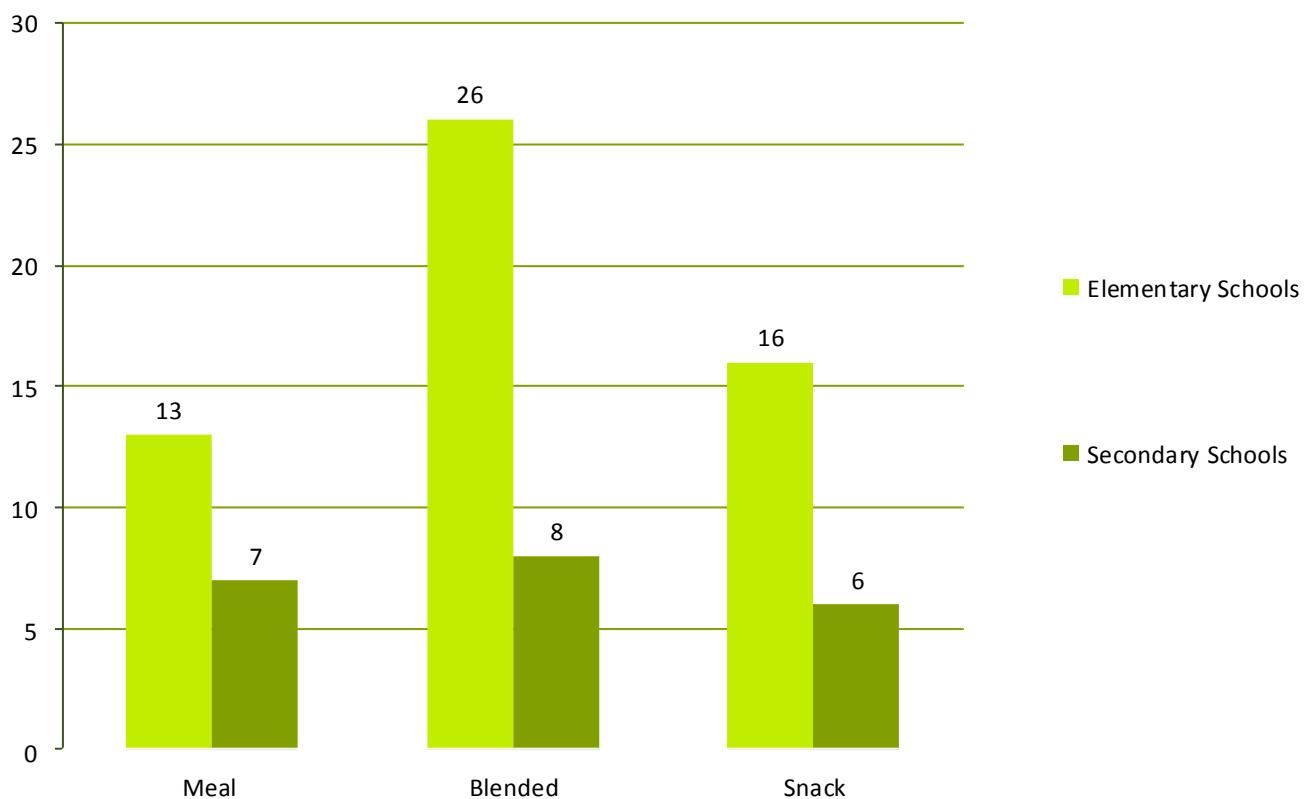
⁸¹ Information London, *Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014*.

⁸² Information London, *Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014*.

⁸³ Information London, *Help Yourself Through Hard Times: Basic Needs Services for London and Middlesex County, 2014*.

participating schools make available to students: a morning meal (3 food groups per individual), a snack (2 food groups per individual), and/or a blended food offering (1 fruit or vegetable per individual, plus access to an additional food group). In the 2014-2015 school year, 80 schools offered nutrition programs (Figure 38) and served a total of 10,140 students 1,630,626 meals.⁸⁴ As discussed in section 6.1, when compared to the total number of elementary and secondary schools in Middlesex-London, only 54% of elementary schools offer OSNP whereas almost 100% of high schools offer OSNPs.

Figure 38: Number of Elementary & Secondary Schools with Nutrition Programs, by Type, 2014/2015 (Source: Ontario Student Nutrition Program, Southwest Region)



Public Transportation

Public transportation is an important means by which persons without private transportation are able to access food. The number of public transportation routes with food access points along the route helps to shed light on how accessible food is for persons living in urban areas. The City of London has a total of 42 transit routes that have sources of food along them. It is important to determine and map the type (large or small grocery, convenience or specialty store, pharmacy) of food access points located on these routes to see if and how much fresh healthy food is accessible to persons using the public transportation system. Researchers at the

⁸⁴ Ontario Student Nutrition Program, Southwest Region, 2015, Web, at <https://www.osnp.ca/>.

University of Western Ontario have already begun this work. In their mapping of the evolution of ‘food deserts’ in London, they found:

... Populations in the majority of the urban census tracts had very good access to supermarkets via public transit, but the population in East London still had poorer access by transit, compounding the impacts of the food desert.⁸⁵

Rural Access to Food and Alternative Transportation System

People often access food close to where they live by using active transportation; that is, any form of human powered transportation, such as walking or biking.⁸⁶ As a result, residents living in rural areas who do not have access to private means of transportation, such as a vehicle, face an additional barrier to accessing food if the distance to food retailers is unreasonable for active transportation. According to the “Linking Health and the Built Environment in Rural Settings” report, this can have a negative impact on the health of rural residents:

A travel survey conducted in eastern Ontario showed that cars are the mode of transportation for 90% of all trips greater than 2 kilometres. Because most food shopping trips in a rural area would surpass this distance – e.g., in 2010, the average distance to the nearest grocery store for households in Middlesex County was over 5 km – rural residents without an automobile are at a considerable disadvantage when compared to their urban counterparts. Among residents with restricted mobility (e.g., due to lack of a vehicle), the need to shop close to home can translate into poorer dietary habits.”

Fortunately, there is an alternative transportation system that runs separately from the public transportation system in Middlesex-London, and this system is helping people who do not have a private vehicle to access food. For example, outside of the city “shuttle programs are now used in many rural communities to address the lack of public transportation. A few examples of this exist in Middlesex-London. In Strathroy, special taxis offer a flat-rate of \$5 to reach anywhere in town. This may be cost-effective for people needing to make a big shopping trip.”⁸⁷ In addition to services that bring people to food, there are food and grocery delivery services that help to bring food to people. These can range from meal delivery services to other services provided to shoppers by food retailers. Middlesex-London has 29 food delivery service providers, of which 9 provide meal preparation and delivery services and 20 (8 of which are Shoppers Drug Mart stores) provide grocery shopping and delivery services. Many of these food delivery services are directly tied to food retailers; therefore, developing the alternative transportation system in a way that ensures rural residents are provided with choice in where they purchase food can help to ensure that the alternative model is also fair.

⁸⁵ Kristian Larsen and Jason Gilliland, “Mapping the Evolution of ‘Food Deserts’ in a Canadian City: Supermarket Accessibility in London, Ontario, 1961-2005,” *International Journal of Health Geographics*, 7:16, 2008.

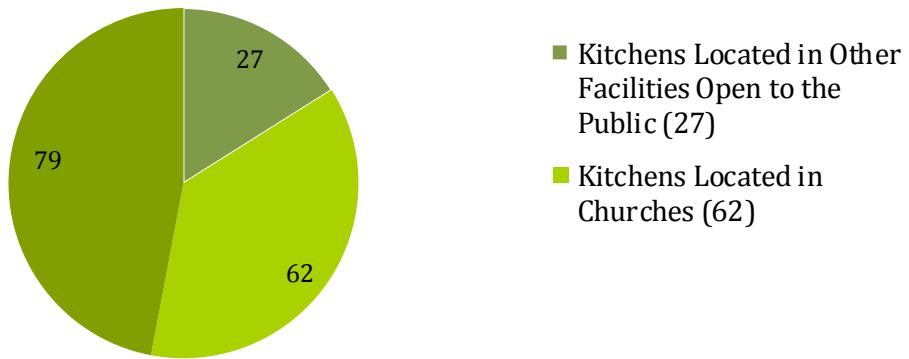
⁸⁶ Human Environments Analysis Laboratory, “Linking Health and the Built Environment in Rural Settings: Evidence and Recommendations for Planning Healthy Communities in Middlesex-London,” 2013, Print, at p. 41.

⁸⁷ Human Environments Analysis Laboratory, “Linking Health and the Built Environment in Rural Settings: Evidence and Recommendations for Planning Healthy Communities in Middlesex-London,” 2013, Print, at p. 32.

Community Food Access

A community kitchen, or collective kitchen is a public space where individuals from a community can come together, often after shopping together, to socialize and share food knowledge and preparation skills while reducing their cost of consumption by cooking together as a collective. There are five community kitchens according to the London Community Resource Centre,⁸⁸ however, when the number of community kitchens in an area is not available, the number of commercial kitchens in an area that are located in facilities that may be open to the public is an indicator of how many potential spaces are available to be used as community kitchens. The total number of spaces (including church spaces, banquet halls, clubs, and centres, and other facilities) in Middlesex-London that have commercial kitchens that could be used as community kitchens is 168 (Figure 39). Although, the number of commercial kitchens being rented or used by community groups as community kitchens is not known, with 168 commercial kitchens the potential for increasing access to healthy, prepared food is there. Community kitchens have many community and food literacy benefits beyond merely increasing access to healthy food.

Figure 39: Number of Commercial Kitchens in Middlesex-London Located in Facilities Open to the Public (Source: Hedgehog Database, London-Middlesex Health Unit)



Distribution

A total of 12 food businesses are involved in the wholesale and distribution of food in Middlesex-London, of which 4 are wholesalers open to the public and the remaining 8 are distributors to the retail and foodservice industries. More information on the big food distributors in the area—including how much food is distributed by them and where their drop-off and cold storage points are—is needed to assess how vital they are to the local food system. As important is information on small-scale wholesalers and distributors, as well as food storage and aggregation (or collection and storage) points in Middlesex-London because this information is key to understanding the true scope of food distribution taking place. Therefore,

⁸⁸ Roxana Roshon and Angelica Nef, "Sustainable Food Systems, Feed the Mind: An Overview of Food and Agriculture Educational Opportunities," 2012, Print, at p. 40.

conducting further research into the wholesale and distribution of food in the area is an important endeavour to consider when planning future action.

What are CSA Farms?

YOU, the consumer, supports the local farmer. The local farmer supports the local economy by their local purchases, hiring locally, etc. Thus supporting your local CSA farmer causes a CASCADE EFFECT for the local community. This approach also helps the environment! The more local products that are purchased, the fewer products are needed to be shipped to the community, thus reducing harmful emissions from transport carriers.

Every CSA is UNIQUE. The crops grown, the size of the shares, arrangements for receiving the weekly boxes of produce and/or meats, length of season, number of seasons and share costs vary from farm to farm. Contact the farms in your area directly for their specific membership information.

While you enjoy your weekly share of the fresh, local, farm-raised food, you must also share in the lack of food should there be a drought, flood, pest problem or other issue that reduces the amount or quality of the food. You become one with the farmer in understanding and dealing with the ways of nature.

Most CSAs grow organic food and provide a diversity of vegetables and herbs in season. Some farms also offer eggs and meat either as the CSA share itself or purchased separately. In general, CSA farmers are dedicated in using the land in a manner that will not deplete its nutrients or value for generations to come. HEALTHY soil produces healthy food.

(Source: Ontario CSA Farm Directory, <http://csafarms.ca/>)

Community supported agriculture programs (CSAs) are a great example of an alternative model of local food distribution that sees consumers sharing the risk of production with the grower or producer. The Ontario CSA Farm Directory Map shows 5 CSA farms located in Middlesex-London,⁸⁹ and there are 204 known households purchasing shares from farms with CSA programs. In comparison to the total number of households in Middlesex-London (180,295) the number of households purchasing from CSA farms is very small.⁹⁰

There are many benefits and some risks associating with joining a CSA (Table 23); however, many of the risks can be mitigated through community-based work.⁹¹ For example, the establishment of a local CSA network can help to pre-season plan with member farms, market and sell their CSA shares, manage consumer expectations, and share information with households on how to prepare meals using the types of food received by CSA farms in the area.

⁸⁹ Ontario CSA Farm Directory, CSA Map, 2015, Web, at <http://csafarms.ca/CSA%20map.html>.

⁹⁰ Statistics Canada, *National Household Survey*, 2011.

⁹¹ Beth Clawson, "Joining a Community Supported Agriculture (CSA) Farm has Benefits," Michigan State University Extension, December 31, 2012, Web, at http://msue.anr.msu.edu/news/joining_a_community_supported_agriculture_csa_farm_has_benefits.

Table 23: Benefits and Risks of Joining a CSA

BENEFITS	RISKS
a) Fresh locally grown food with minimal handling b) Introduction to new vegetables and recipes for preparing them c) Typically get to go visit the farm where your food is grown d) Learn more about how your food is grown e) Not unusual that the member families are able to participate in growing their food and often children will try more varieties of vegetables f) Build a relationship with the farmer that grows your food g) Organically grown food – inquire with the CSA to be sure h) Environmentally sustainable through fuel savings by not shipping and storing the food	a) Crop failures mean losses to both the farmer and the CSA member b) Expectations for food volumes, varieties or hands on activities not fulfilled c) Unfamiliar or unanticipated food types requiring learning time to grow accustomed to them d) Fungus, insect attack or disease causing the produce quality to be unacceptable e) Unexpected events in the life of the farmer disrupting production f) Not a certified organic farm – inquire with the CSA to be sure

Further research into developments in alternative food distribution in Middlesex-London, which may include co-ops, developing food hubs, or programs like Coupons for Hunger, will help to shed light on the size and scope of the alternative food distribution system in the area.

Bonduelle

Bonduelle North America's Strathroy food processing facility is located in the Municipality of Strathroy-Caradoc. The main factory comprises a sprawling 82,000 square feet and a second cold storage site is a massive 171,000 square feet. The plant processes frozen vegetables for the Canadian and northern U.S. market, churning out 80 million pounds of primarily peas, beans and carrots under the Arctic Garden brand and many store brands.

Source: Middlesex County, "Bonduelle," <http://www.county.middlesex.on.ca/Bonduelle>.

Processing

The processing of food grown, raised, or harvested in an area can, on the one hand, add significant value to this food, thereby increasing its impact on the local economy. On the other hand, small scale food processing contributes to the relationships within a community by shortening the food value chain. These are two reasons why infrastructure supporting local food processing is so important to the health and sustainability of a local food system. In Middlesex-London there are 2 abattoirs, one of which is located in London. In addition, of the Province's 23 registered egg-shelling stations, two are located in the area; however, none of the eight registered egg-processing stations in Ontario are located in Middlesex-London. Finally, Strathroy-Caradoc is home to one of Bonduelle Canada's food production sites. Bonduelle is a

multinational corporation that has “one hundred and thirty local employees take raw, freshly harvested vegetables, clean and blanch them, and then subject them to the individually quick frozen (IQF) process.”⁹² The IQF process helps to preserve the quality of the produce by preventing large ice crystals to form when it is frozen.

While big food corporations like Bonduelle can certainly help to stimulate job creation, the vast majority of the food they process leaves the region in which it was grown. This means that the dollars associated with the value added to the food they process locally does not stay local. It also means that the food they produce or process is often not consumed locally. In contrast, small-scale local food infrastructure can help to employ locals while keeping food dollars close to home and in the hands of people who live in the area. The findings suggest that a gap in small-scale local food processing exists in Middlesex-London. Therefore, it is important conduct additional research into any micro-food processing activity that is taking place in the area to see if and how it can be supported in both scaling-up and marketing to local consumers. A food processing needs assessment for the Middlesex-London food system is another activity that could be conducted by the community to determining opportunities for new processors.

Coupons for Hunger

Together with the support of Londoners just like you, we are able to help address the needs of the estimated 25,657 residents of our city that face food insecurity every year. With your help we acquire low, or in many cases no-cost, grocery items through our couponing programs. Through our partnership with the London Food Bank, these items are then distributed to households across our city that find themselves in need.

Our programs comprise three parts. First we collect coupons through drop-boxes located at all sixteen of the London Public Library locations. Secondly, we clip and sort these coupons at our Coupon-a-thon drives, whether in the form of hosted Employee Engagement Programs or at our drop-in programs downtown. We the cash the coupons we've collected and donate the resulting groceries to the London Food Bank and other organizations such as Mission Services, Women's Community House, Animal Rescue Foundation, Ronald McDonald House, Tampon Tuesday and more.

The third arm of our program centres around education. Through our Coupon Workshops we are able to teach couponing skills to attendees who are then in turn empowered to drastically reduce their own monthly grocery bills.

Source: Coupons for Hunger, <http://www.couponsforhunger.org>.

⁹² Middlesex County, “Bonduelle,” 2015, Web, at <http://www.county.middlesex.on.ca/Bonduelle>.

4.2 Gaps in Knowledge

The findings on food access and distribution were plentiful, especially on food retailers and service providers; however, there are a few gaps in knowledge that can help to inform future research. Both defining and breaking out the number of fast food establishments from the total number food service outlets can help to shed light on how many restaurants and take-away outlets are serving fast food. Additional information on food distributors, wholesalers, aggregators (who collect and store food) and food warehouses, as well as community food hubs, is also needed, and a map of these would be extremely helpful for planning future action. Finally, the percentage of food that gets processed and sold to Middlesex-London residents, alongside information on the potential barriers and solutions to increasing local food processing and procurement, need to be determined.

4.3 Strengths and Assets

A diversity of material assets—that is, what is owned and what is used—span across Middlesex-London’s food system. For example, there are 600 retail food access points in the area, of which 93 are supermarkets or grocery stores. The many rural farm gate retail operations are also material assets that can be accessed in future community action planning. In addition to retail food access points, Middlesex-London has 788 restaurants, and this does not include the 355 take-out food establishments. All of these food service businesses can be used as ways to get more local food to the consumer. Last, there are numerous farmers’ markets in London, in addition to a strong farmers’ market scene that can be cultivated to become a substantial cultural asset for the community.

The above strengths and assets have helped to grow a large market for locally grown food in Middlesex-London. Having healthier food made available to children and youth through the Ontario Student Nutrition Program can strengthen this market.

While they are neither food retail nor food service establishments, a large number (168) of inspected commercial kitchens are located across Middlesex-London. These commercial kitchens are important material assets for the food system because they have the potential to become community or collective kitchens. With limited local food processing taking place in the area, these facilities could also be used to incubate small processing and value-add businesses.

Middlesex-London has 37 meal programs, 1 Good Food Box program, and a total of 21 food banks. While these are cultural and material assets, respectively, the community may want to assess whether they are addressing the root causes of food insecurity in the area. If they are not, then the community may choose to plan action around developing these assets or planning more innovative strategies to address food insecurity, such as building community capacity.

Finally, all of the abovementioned assets are supported by a strong public transportation system in London, developing alternative transportation activity in the rural areas, and the 401 and 402 transportation corridors that run through the area. This transportation network is a great resource for the area, and one that the community should take full advantage of when planning future action.

Table 24 lists all of the strengths and assets identified through the community food assessment process that pertain to this section of the report (please see 1.2 for Asset Legend).

Table 24: Strengths and Assets within Food Access and Distribution

FOOD ACCESS AND DISTRIBUTION						
34. Food access points in retail sector						
35. Farmers markets in London						
36. Public transportation						
37. Large number of meal programs (33), food banks (17) and a good food box program in London						
38. 168 inspected commercial kitchens (potential to be used as community or collective kitchens)						
39. Transportation network (e.g. 401/402 corridor)						
40. Western Fair District Complex						
41. Churches and community centres with food cupboards						
42. Large food processors						
43. Railway						
44. Farm gates in Middlesex						
45. Large number of restaurants (50% of food service outlets)						
46. Foodland Ontario sections in grocery stores						
47. Food delivery programs						

FOOD ACCESS AND DISTRIBUTION

48. Free healthy food through ONSP (high number of elementary and secondary schools participating)

49. Large market for locally grown food

4.4 Areas to Cultivate

There are three areas to cultivate in Middlesex-London that relate to Food Access and Distribution: local processing and distribution; food access; and emergency food.

Local Processing and Distribution

Aside from three abattoirs and two egg-shelling stations, there is only vegetable processor, and it's a multinational corporation focused on national and international trade. Even counting the twelve wholesale and distribution businesses, Middlesex-London has few food system assets involved in adding value to agricultural products in the middle of the food value chain. This missing middle, as it is often referred to, affects the ability for smaller-scale local producers to compete in the marketplace. To start, local producers have difficulty increasing the value of their products through processing. Furthermore, even if they can add value to their products, they are unable to get them to market. Community members noted that large wholesale and distribution businesses control the marketplace, so unless small producers sell directly to residents in the area, the public's access to local food is limited. Similarly, the variety of local food products the public is able to access is reduced when niche or speciality producers face distribution barriers. Therefore, working to address the missing middle, towards increasing the area's capacity to process and distribute local food, is an important area to cultivate in Middlesex-London's food system.

Food Access

While there are many food retail and service access points in Middlesex-London, including supermarkets and grocery stores, restaurants, farmers' markets, and farm gates, access to food remains a significant issue for many community members. Stakeholders mentioned that the public transportation system isn't very effective and can be costly, in addition to being difficult for families with children trying to transport food. This issue is further compounded by the fact that many residents of the City live in food deserts. Key informants also pointed out that there is no public transportation available in rural areas. In regards to types of food available, community members were sorry to report that much of the food that can be obtained in the area is imported into the region from the United States and farther abroad. A very large number of survey respondents also reported that food pricing or the cost of food makes accessing fresh healthy local food very difficult. With food prices going up, respondents noted, the quantity versus quality equation becomes too financially challenging to solve. For these

reasons, food access and availability is a key area to cultivate in the Middlesex-London food system.

Emergency Food

Middlesex-London families in need of emergency food have limited access to the food being made available to them. While emergency food programming exists in the area, many emergency food locations close before people finish work and are not open on the weekends. As much of a concern is the fact that the food available at food banks often needs to be non-perishable. The result is emergency food that is often neither fresh nor locally produced. The inadequacy and unacceptability of emergency food were both highlighted by community respondents to the survey. Not surprisingly, community members suggested that nutritious food, including fresh fruit and vegetables, and healthy alternatives should be priorities for emergency food providers. Providing food choice, such as local food and meat options, were identified by survey respondents as specific areas for food banks to concentrate on. However, the development of existing food system assets is not the only way to cultivate food access. Emergency food resources could be reallocated towards efforts that focus on building social capital and growing community capacity. For example, community development projects that transfer food literacy skills to individuals could help people to conquer their own food insecurity.

4.5 Opportunities for Change

Middlesex-London residents who participated in the community survey (see Community Engagement) were asked to rate their level of agreement with four statements. The first two of these statements are related to food distribution and the second two are related to food access:

- It is important that food grown or farm animals raised in Middlesex-London are also sold here;
- It is important that food grown or farm animals raised in Middlesex-London are also processed here;
- It is important that Middlesex-London emergency services provide local and healthy food; and
- It is important that Middlesex-London emergency services provide local and healthy food.

In response to the first two food distribution statements (Figure 40 and 41) a strong majority (70%) of residents “strongly agreed” that it is important that food grown, or farm animals raised, in Middlesex-London was also sold in the area. Interestingly, only 58% of the same respondents “strongly agreed” that food grown, or farm animals raised, should be processed in the area.

This suggests that food production is slightly more of a priority than food processing for residents of Middlesex-London. Considering the missing middle described above, this poses a problem for increasing local food access and consumption in the area. In other words, if the infrastructure to process and distribute local food is not prioritized then food grown locally will have to leave Middlesex-London to be processed, thus reducing its economic impact. Furthermore, the likelihood of this food returning to the area is low, and if it does the cost will be higher.

"Food forests are great because they allow food to grow naturally and are available to everyone, but a lot of people are not aware of them...They are beautiful and become a source of food for people who have little other options."

- Survey Respondent

Responses to the two food access statements were more closely aligned (Figure 42 and 43). A majority of survey respondents "strongly agreed" that it is important for emergency services to provide local healthy food, when and where people need it.

Figure 40: It is important that food grown or farm animals raised in Middlesex-London are also sold here

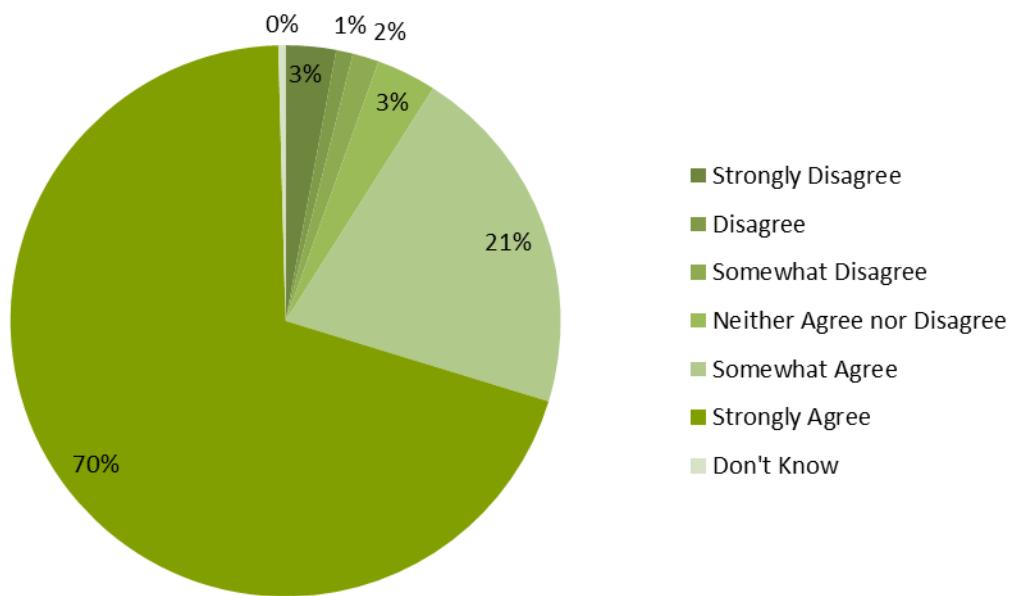


Figure 41: It is important that food grown or farm animals raised in Middlesex-London are also processed here

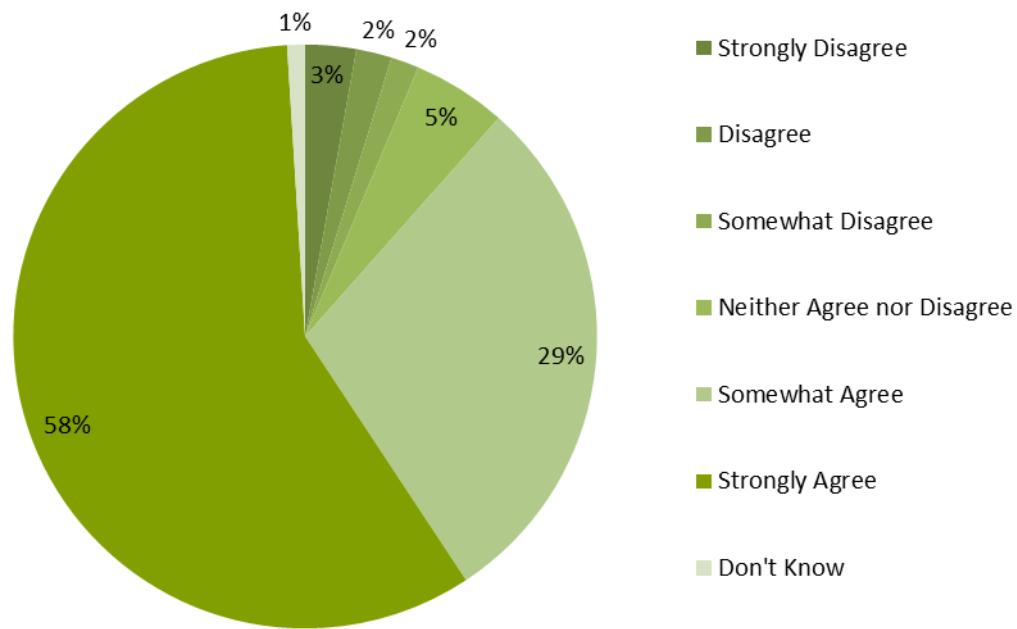


Figure 42: It is important that Middlesex-London emergency services provide local and healthy food

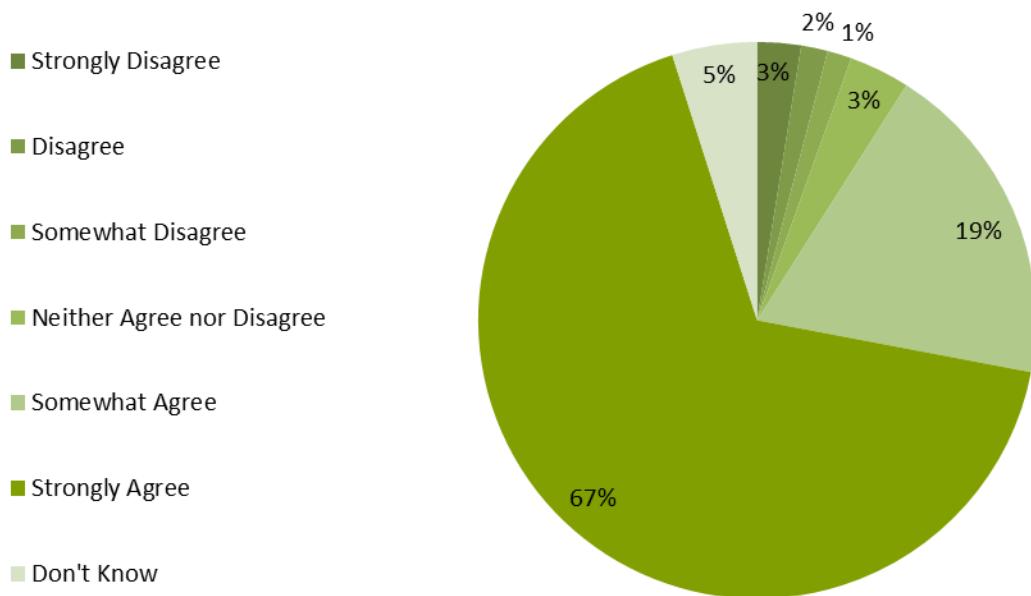
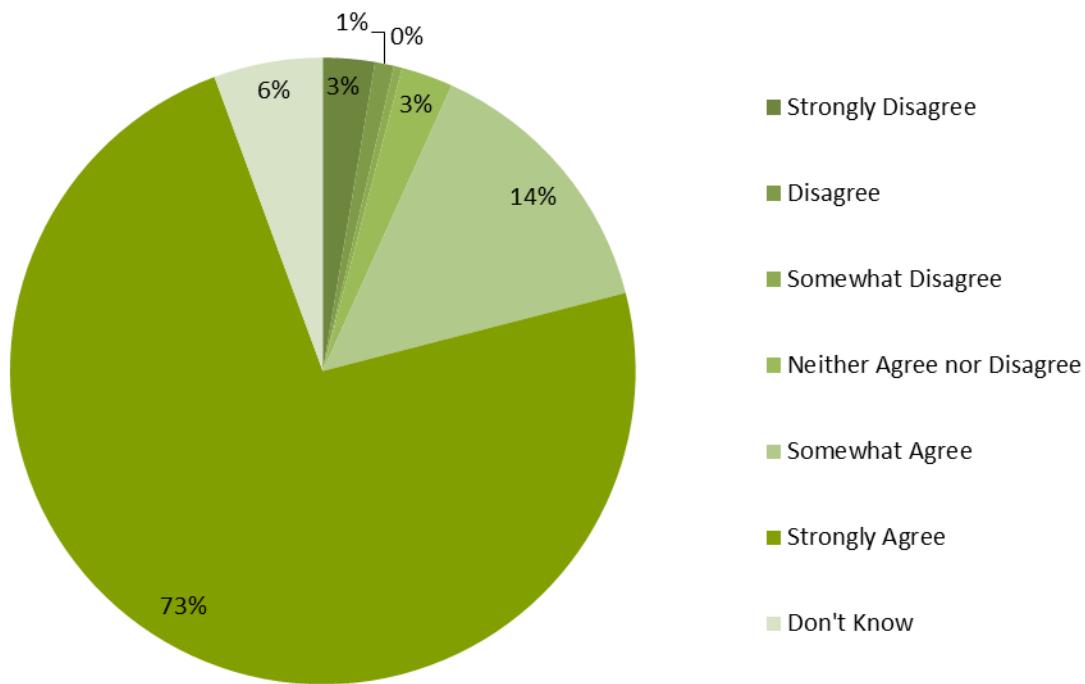


Figure 43: It is important that Middlesex-London emergency services provide food when and where people need it



Community members shed light on a number of unique but related opportunities for change in how Middlesex-London processes, distributes, and markets food, as well as how the community can work towards increasing food access for its residents. To start, the development of a certified cooperative processing facility with shared equipment was suggested. This type of facility would both help to connect growers and producers and allow them to test if there is a business case for adding value to their product through processing. Similarly, a mobile processing solution was identified as a potential future initiative, and a Mennonite travelling cannery was referenced as an example of what this could look like.

The creation of a local food hub, to collect, store and distribute food across Middlesex-London, is another idea that stakeholders shared. If such a facility is not feasible, then community members suggested developing more programs that deliver local healthy produce to people who can't travel to food access points; mobile food trucks that sell produce to neighbourhoods located in food deserts was a great initiative that came out of discussions with stakeholders.

Finally, increasing local food consumption was identified as an opportunity for change. Key informants noted that this could mean challenging existing food procurement policies as well as working towards the creation of new innovative ones that leverage the purchasing power of large local institutions. Survey respondents noted that a change in how local food is being marketed could also take the form of a better labelling system that identifies where food is coming from and where it is processed. This type of initiative, community members suggested, could be coupled with an increase in the marketing of local farms, the development or

promotion of a resource that could help people to find local food, and the continued establishment of local satellite farmers' market sites.

Along with the above opportunities for change in food distribution, which can have a positive impact on food access, community members identified a number of changes that could increase food access and security for Middlesex-London residents. The promotion of emergency food programming and an increase in the volunteer capacity at emergency food locations was an opportunity that presented itself, along with working to change the operating hours at these locations to be more user-friendly. Increasing the capacity of food banks to accept, store, and work with fresh and whole foods, was also noted by community members as a future initiative the community could take on. The development of programs that will benefit those most in need of food was also a theme that came out of the community engagement process. A door-to-door food excess collection program, where individuals donate food they may not have an immediate need for, or a food buck program where food bucks can be used in grocery stores were two examples provided.

Farmers' Markets

18



Food
Service
Outlets
1452

Total Annual
Food
Expenditure
in 2014
\$1,441,544,617

600
Food
Retail
Outlets

Copenhagen
Brygge
30,626
MEALS

0,140
STUDENTS

80 SCHOOLS

**Ontario Student
Nutrition Program**

4.0 FOOD ACCESS AND DISTRIBUTION

168 Commercial
Kitchens

5 CSA Farms