

# Local Food in Saskatchewan: Barriers and Opportunities

## Final Research Report



### Report prepared by

Holly Campbell, PhD Candidate (Interdisciplinary)  
Department of Sociology and Social Studies, University of Regina

Tracy Sanden RD, MPH(HP)  
Health Promotion, Regina Area, Saskatchewan Health Authority

Taya Triffo, BA  
Department of Economics, University of Regina

Amber J. Fletcher, PhD  
Associate Professor, Department of Sociology and Social Studies, University of Regina



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## Executive Summary

Saskatchewan agriculture is heavily focused on export, which has led to a relatively underdeveloped local food system compared to other parts of Canada. Key reasons for the province's strong export orientation include export-oriented policies dating back to the establishment of commercial agriculture in the late 1800s and continuing today (Fowke 1957; Government of Saskatchewan 2017), in addition to geographic and climatic factors such as Saskatchewan's high land-to-population ratio, dispersed rural population, semi-arid climate, and long, cold winters. Contemporary agriculture in Saskatchewan is highly industrialized and centred on large-scale production of grain and oilseed crops, cattle, and other livestock. In the unique context of Saskatchewan, farmers wishing to sell their products in local markets face specific challenges that may not exist in other Canadian regions, such as southern Ontario or British Columbia (e.g., Newman et al. 2015; Telfer 2008; Statistics Canada 2017b).

Following up on an identified priority in the 2013-14 Food Regina Action Plan, a study conducted by University of Regina and Food Regina aimed to identify challenges and solutions to strengthen the local food system in Saskatchewan. Based on the results of 50 interviews and 2 focus groups with 60 food system actors in the province, this report highlights some realities of the local food economy in Saskatchewan. It draws out themes that emerged among producers, processors, and distributors alike, along with several health inspectors and policy experts. These findings identify barriers to a thriving local market, some opportunity for change, and recommendations to support a greater infrastructure for local food.

For new farmers, key challenges include prohibitive initial investments such as irrigation, equipment, and the cost of land—costs which are increasing. Farmers also reported challenges including lack of access to farmers' markets and grocery stores, the costs of distribution and transport, lack of processing plants in Saskatchewan, and the costs of meeting and understanding regulatory standards. Lack of access to information was a significant theme, as many producers do not know which steps to take in expanding their operation and have difficulty negotiating health regulations that differ between institutions and/or jurisdictions. For those trying to practice sustainability, there are the challenges of maintaining production levels and striking a balance between localization and sustainability when these do not always align.

Despite these challenges, there is potential for change. Consumer attitudes have been changing over recent decades, contributing to increased demand for local food options (Christy et al. 2013), and education about local food is an on-going process. Although existing literature on local food networks tends to emphasize consumer demand as a key driver for local production and sales, our findings indicate that in Saskatchewan, localization is also driven heavily by farmers' own desire to "go local". Many farmers questioned the current status quo of agri-food production in Saskatchewan and around the globe, pointing to local sales as a viable and desirable alternative to the vagaries of global markets.

Key recommendations from this study that would support Saskatchewan's local food economy include:

### **Centralized Knowledge Source**

- a. A centralized knowledge source, such as a website or information hub. Information should cover all key steps to producing and selling locally, including production and marketing information, health and environmental regulations, grants and funding sources, training and mentoring opportunities, and other infrastructure needs such as processing locations, with contact information.
- b. Consistency in information provided to farmers on health regulations. There is an opportunity for provincial and federal health inspectors to work closer together to ensure that the same message would be provided regardless of inspector. It would also be beneficial as part of a health inspection to ask what the future goals are for the producer. This would allow the producer to be aware of any future regulations that may need to be considered early in the process and allows a more proactive approach, saving both the producers and inspectors time and money.

### **Centralized Distribution Centre**

- a. A centralized distribution centre (or food hub) which could include storage facilities, a commercial kitchen, and shared equipment and resources for nutrition labeling and packaging, thus decreasing infrastructure costs for producers.

### **Government Support & Start-Up Grants**

- a. Improved funding supports for local food production. This area requires further exploration; however, it could include government-funded start up grants appropriately scaled for smaller-scale and new local farmers.
- b. Training and mentorship programs for new farmers and those wishing to localize their production.
- c. Increased institutional procurement of local foods by public institutions (e.g., hospitals, government cafeterias) could encourage local producers and provide stable demand.

### **Infrastructural Supports**

- a. Support for local infrastructure, including local processing plants, would decrease a significant barrier for producers.

### **Education**

- a. Increased public education on food production and the detrimental effects of "cheap food".
- b. Increased public education on how to prepare and consume foods which are grown, but currently not readily consumed, in Saskatchewan (e.g., lentils).

In sum, Saskatchewan has incredible potential to grow its local economy. Although there is far to go, local producers have reasons to be optimistic.

## Introduction

Food policy frameworks are complex, multi-departmental, and even intergovernmental (Koc et al. 2008). Little research exists on the policy frameworks that facilitate or hinder local food systems in Saskatchewan (Qualman et al. 2014), especially from the perspective of those producing local food. Therefore, the purpose of the “Local Food in Saskatchewan: Barriers and Opportunities” project was to examine the policy barriers and opportunities for local food production and sales in Saskatchewan with emphasis on production-side factors and particularly the perspectives of farmers, processors, and retailers/distributors.

This project built upon the findings of the Regina Community Food Assessment (CFA), which was conducted from September 2013 to March 2014 by a coalition interested in local food security. Although the CFA focused on the city of Regina, the process identified the importance of engaging with farmers around the province as part of the broader local food system. The CFA identified a strong need for further research on policy barriers and opportunities for local food in Saskatchewan.

### Terminology Note

This report uses distinct terminology to help readers succinctly differentiate between participants. Terms like “farmer”, “processor”, and “distributor” are used to indicate a participant’s main occupation. At times, additional descriptors are added to provide context for the participant’s perspective. For example, farmers who were engaged in production or processing for local sale will be referred to as “local farmers”. The term “conventional” is used to refer to non-organic practices, as is common parlance in the Saskatchewan agricultural system. When reporting on views shared across categories, such as views or roles of farmer, processors, and distributors, the more general term “producer” is used to recognize widespread applicability.

## Background

From its origins in the late 1800s, commercial agriculture in Saskatchewan was designed and developed for export. Originally established as a system of small family-based farms producing export-oriented staple crops like wheat (Fowke 1957), prairie farmers adapted to challenging climatic and economic conditions to establish one of the most agriculturally productive regions in Canada (Statistics Canada 2011).

Over the past fifty years, the structure and governance of prairie agriculture has changed dramatically. The number of farms has declined, but their average size has grown at a rate surpassing that of the post-WWII boom (Fletcher and Knuttila 2016; Statistics Canada 2007, 2017a). Large, highly industrialized farms—most still family owned and operated—now dominate the rural landscape. Emphasis on export remains strong, with agri-food exports comprising 47% of the province’s total exports (Government of Saskatchewan 2017). Grain and oilseeds continue to dominate agri-food exports, which includes the export of canola oil fueled by domestic canola processing (Government of Saskatchewan 2017). The 1980s brought a paradigm shift which

reduced government intervention in markets and fewer safety nets. Farmer-run grain companies have now been eclipsed by multinational agricultural corporations, which are often vertically integrated throughout the food chain.

At the local level, Saskatchewan farmers remain highly concerned with the “cost-price squeeze”: the margin between commodity prices received and those paid for inputs like seed, chemicals, fuel, and transport. Although Saskatchewan currently lacks a public database on input costs (Robinson 2018), recent studies conducted with Saskatchewan farmers have reported high levels of concern about rising input costs (Shuba et al. 2016). Despite an apparent upward trend in farm net income so often emphasized in agricultural and popular media, statistics show that farm income *variability* has also increased dramatically since the mid-2000s, leading to more uncertainty for farmers (Government of Canada 2018; Statistics Canada 2014).

In the context of highly globalized and large-scale agriculture, some Saskatchewan farmers have sought an alternative in local food networks. Although variously defined, “local food” generally refers to sourcing, processing, and selling agri-food products from the nearest producer, to the greatest extent possible, in an effort to reduce both geographical and social distance between producer and consumer. Local farmers are producing goods that can be sold locally through direct marketing and sales, sometimes using on-farm or nearby processing, value-add activities, U-Pick operations, and/or Community Supported Agriculture (CSA) models. Examples of local food distribution initiatives currently existent in Saskatchewan include farmers’ markets, farmgate sales, initiatives to make local produce available on store shelves, and other distribution initiatives for local food (e.g., food delivery systems, hubs), or combinations thereof.

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Consumer interest in such models is growing and demonstrated by the popularity of local farmers’ markets (Connell et al. 2008), the “100-mile diet”, various “eat local” campaigns found in some parts of the country and in some large grocery chains. Saskatchewan is responding to this demand and following the lead of other provinces in efforts to enhance Saskatchewan’s local food scene. For example, Local & Fresh is a local food delivery service with a warehouse open to the public. Prairie Fresh Food Corporation is an organization of farmers supplying produce directly to local Co-op grocery stores (Federated Co-operatives Limited) as part of their “Grown at Home” initiative. Such initiatives demonstrate both the possibility and the desire for local food in Saskatchewan.

Most existing academic research on local food in North America has focused on consumers' motivations or the systemic aspects of local food networks (e.g., infrastructure, marketing) (Campbell and MacRae 2013; Connell et al. 2008; Denny et al. 2016; Feldmann and Hamm 2015; Friedmann 2007; Wittman et al. 2012). In general, this literature concludes that consumers' motivations to "buy local" are based on a rejection of "status quo" industrial agriculture (Connell et al. 2008; Costanigro et al. 2014; Knezevic et al. 2013) and by a desire to reconnect with food and its source (Albrecht and Smithers 2018; Hendrickson and Heffernan 2002).

Very little research, however, has focused on the perspectives of production-side actors, their reasons for "going local", and both the benefits and barriers they face in doing so. Farmers interested in producing for local markets must consider a dizzying array of factors including health regulations, inspection and standardization rules, barriers to major grocery retailers, weather fluctuations and seasonality, and business management challenges (Gordon and Piwowar 2009). Although farmers' markets are important outlets for producers of commodities like vegetables and honey, they are largely dependent on customer attendance and may not provide a sufficient or stable income for producers. In light of these barriers, this project sought to identify the benefits and challenges of going local from the perspective of food producers.

## Methodology

To provide a better understanding of the farmer's perspective lacking in CFA, a qualitative approach was used to inductively examine producers' experiences and interpretations of barriers and opportunities for local food in Saskatchewan. Therefore, the themes presented in this report are derived directly from the "top of mind" experiences and opinions of participants, rather than on hypotheses pre-defined by the researchers. Using a participatory research framework, all participants were invited to become advisors to provide advice and oversight on research design, participant recruitment, and reporting. The advisory group began with 7 members and nearly doubled to 13 members by the end of the project.

Three qualitative methods were used: (a) semi-structured interviews; (b) focus groups; and (c) a participatory interpretation session held in June 2017 at the University of Regina. The interpretation session served to share the initial results from the interviews and focus groups with participants for feedback and discussion. Through a "conversation café" activity, participants evaluated and prioritized recommendations from the data. Interview and focus group transcripts were independently coded by two researchers using NVivo software; the coded results were then separately analyzed by four researchers. Notes from the interpretation session and other project meetings were added to the analysis presented in this report. Participant recruitment methods included: promotional flyers, social media such as Facebook and Twitter; email announcements through various networks including APAS; and snowball sampling.

## Participants

In total, 60 diverse food system actors in Saskatchewan participated, including farmers, processors, policy experts, health inspectors, business or industry groups, as well as retailers, distributors, and restaurateurs. Fifty-one people participated in in-depth interviews, 9 participated in a focus group,

and 3 participants participated in both, bringing the overall total (including repeat participants) to 63. A total of 9 attended the interpretation session. Table 1 provides a breakdown of participants by their areas of focus.

**Table 1. Summary of Participant Classifications, Number of Participants per Method**

Participant Classification	Interviews	Focus Groups
Farmers	21	2
Farmer + processor	4	
Farmer + retailer/distributor	3	
Farmer + policy expert	3	
Policy experts	7	2
Business/industry/marketing representatives	5	
Distributors/retailers/restauranteurs	4	4
Processors	2	1
Health inspectors	2	

Participants lived in a variety of different Saskatchewan communities. Amongst the farmer participants, almost all were producing some combination of grains/oilseeds, livestock, dairy, or vegetables. Not surprisingly, the project attracted many farmers already involved with local food networks and/or alternative food systems (AFNs). Over half of the farmers identified as organic or natural (i.e., organic or nearly-organic in practice but not certified, or in the process of certifying); the other half were not organic. Direct-to-consumer marketing was done by 12 of the farmers (this included CSAs, farmers' markets, and farmgate sales), 12 used corporate marketing (the most common marketing mechanism in Saskatchewan), 4 used both, and the remainder were supply-managed or engaged in other arrangements (e.g., U-pick operations). Recognizing the need to engage farmers who were not involved in local networks or AFNs, the researchers purposively sought out larger-scale producers and successfully recruited several large-scale conventional producers; the remainder were considered medium- or small-scale. Fifteen of the farmers were women and 18 were men.

## Findings

The qualitative interview and focus group data were organized into themes, which are discussed in this section. The interview guide can be found in the Appendix.

### Views on the Food System

Participants were asked for their own definitions of what constitutes “local” food. The two most common definitions were either a “100-mile”/“100-kilometer” definition, or produced within the borders of Saskatchewan. Some spoke about locally sourcing as many components as possible rather than importing ingredients from elsewhere to prepare in Saskatchewan. Others used a shifting definition and noted that, depending on the commodity, the closest source may be in another province or even another country.

While many participants expressed the importance of food safety and sustainability, their views on how to achieve these values were highly divergent. Some conventional farmers promoted the benefits of industrial practices (e.g., genetically modified organisms, use of pesticides and herbicides) and felt consumers were misinformed about such practices and required more education. In contrast, local and organic farmers wanted consumers to be more aware of the benefits of local and organic production; many of these farmers expressed concern about industrial practices and their effects on both the environment and food safety. Local and organic producers were often motivated by a resistance to, or critique of, the dominant form of export-oriented, industrial agriculture in Saskatchewan.

Many concerns were raised about long-term environmental challenges. Examples include the overuse of pesticides and its impact on water tables, as well as wider environmental impacts. A non-organic farmer whose own farm had been affected by weed resistance talked about herbicide reliance as an industry-wide threat. More generally, concerns were raised that intense land use could affect soil fertility over the long-term. Whether their views supported organic or natural farming or conventional farming practices, it was apparent that farmers were passionate about their work. All had a desire to grow or raise high quality food.

Farmers questioned “cheap food” policy and discussed the benefit of educating consumers on the true costs of quality food production. Some participants had fundamental concerns with a food system guided mostly by economic principles: reaching economies of scale, consolidating, and getting goods for a cheaper price. In light of this, an organic producer expressed that, “organics [contributes to a change in the food system] through transparency, traceability and third-party verification, which is really trust and social licence... that is definitely the foundation or the bedrock of the [organic] movement and part of building the alternative to the current system.”

A few participants challenged the notion of local food as inherently sustainable, noting that local production and sale does not automatically equate to sustainable practices. Sometimes, unsustainable practices are required to grow certain products locally. A conventional farmer with a strong environmental focus gave the example of Saskatchewan-grown chickpeas:

“I wouldn’t eat chickpeas grown on our farm. We have only grown them once, because to be grown here in our climate they need to be sprayed like seven times with a fungicide. So local food can have huge costs and problems. It can be worthwhile economically and people do grow chickpeas around here, but a much better option is to get chickpeas from southern Alberta or even other countries perhaps because they don’t have to spray any fungicides or maybe one pass [of spray]. So the transportation cost is bigger but the whole energy cost and of course the health cost of that is far greater. So local food like everything is efficient in its own respect and everything has to be considered separately.”

A distributor discussed the challenges of unreasonable customer demand. Attention to and popularity of local food is growing. Even so, lack of knowledge about food production can mean that customers may expect, for example, fresh Canadian-grown apples in mid-January. Local distributors may be unable to meet that demand, so out-of-season foods are purchased from elsewhere.

## Systemic and Structural Barriers to Local Food

Many participants observed that infrastructure, the economy, and provincial policies on food production in Saskatchewan are strongly geared towards export. A number of reasons were given for this, including the geographic realities of Saskatchewan's land-to-population ratio and climate, as well as a long-standing tradition and culture of export facilitated by agricultural policy.

Several participants discussed the need for an export economy on the basis of Saskatchewan's large land mass and small population. The province's productive capacity of certain goods (e.g., grains and oilseeds) far outweighs what the local population can consume. Here, export markets represent important outlets for the excess food produced. The need for such outlets were especially pronounced among grain and legume farmers, whose contributions make Saskatchewan one of the largest global producers of these products.

One local farmer and distributor pointed out that support for export markets need not come at the expense of support for local markets. These two can exist in tandem. In the farmer's own words: "I would like to be able to grow the local market to its fullest potential, but we are always going to need an export market because we have so much productive land here in Saskatchewan." Nonetheless, few participants were actually engaged in both local/direct marketing and export/corporate marketing simultaneously; there was a tendency amongst participants to focus on one system or the other.

Saskatchewan's food economy, as a whole, is a net importer, but producers remain largely oriented toward exports. To keep profitable as an exporter, Saskatchewan has specialized in producing foods that can survive fluctuating temperatures and water levels, and which can mature within a short growing season. This specialization is reflected in Saskatchewan's top export commodities (Government of Saskatchewan, 2017). Grains, pulses, and oilseeds can travel long distances and thrive in our climate. Live cattle, another top export, endure Saskatchewan's climate similarly well. Along with these export opportunities, a cold, dry climate presents challenges for local production. Greenhouse projects try to expand the growing season, but imports remain necessary to supply the diversity that consumers want. Importing also keeps the food supply consistent during colder months.

There is also ample infrastructural, policy, and cultural support for export. Several participants noted that selling into the export system is made relatively easy by its accessibility. For instance, grain terminals and processing plants are in place, and there is a transportation system designed with agricultural export in mind. The use of these systems has been learned over generations, too, and has arguably further encouraged export. This intergenerational support, in part, has elevated the export economy's status as a provincial philosophy and as a matter of pride in Saskatchewan. From industry food conferences to government-led communications, interviewees consistently felt rallied to "feed the world" and get their products sold into export markets.

Several producers argued that because of this export focus, provincial policy has centred on export, thus setting a specific standard for what it means to be a successful producer. In one farmer and policy expert's words: "they [policy-makers] prioritize export and if that becomes the goal, the measure of success by our governments, you know 'how much did you export?', 'how much did

you trade?', then the local food system disappears from attention.” The lack of attention to local distribution has led to specific policy decisions, like the elimination of the provincial hog marketing board in 1997. One participant suggested this was a key structure that underpinned Saskatchewan’s local hog market.

As another farmer and policy expert explained, the increasing focus on export and international trade has not necessarily benefited farmers:

“One of the things that the National Farmers Union has highlighted consistently and repeatedly is that Canada’s agriculture and agri-food policy is not so much a policy about food, it is about trade and we see that there is a lot of priority given by the government to increase trade and increase volume produced for the purposes of trading internationally. And when you look at the impact of this policy direction over the past 30 to 40 years you see that farmers have not benefited from this policy, that farmers’ incomes have not gone up, the overall farm income has stayed stagnant while the cost of farming has gone up a lot and the growth income which is the money that you get for your crop before you pay your expenses has gone up, but expenses have gone up so much that the income for farmers has not increased.”

## Opportunities to Strengthen Local Food Production

Despite these challenges, many participants discussed areas where they see potential for change in the local food industry, and changes that are already taking place.

### Changing attitudes, education, and social connection

One area where producers are seeing change is with consumers. While many of the local and organic farmers were motivated by forces beyond consumer demand—such as rejection of industrial practices or concern about growing corporate market power—consumer demand is still necessary for their success. As consumers become more interested in local food, opportunities begin to open up.

Participants felt that consumers were motivated by the desire for change in the food system. A policy participant discussed consumer motivation to eat local and organic food: “it can be more philosophical or based on activist tendencies. You know, they are food system warriors really, and they know this current system is broken in so many ways that in whatever way they can are trying to support an alternative food system.”

This shift in attitudes has provoked change in the market. Major grocers and food chains now offer and promote locally sourced foods. Several producers have observed a positive shift in public opinion and perception of local farming. As one farmer and processor said:

“I think that is slowly starting to turn around. I think it is starting to change because even in big stores like Sobeys you see all these signs promoting local and I think people are starting to demand more local things, and so things are starting to come up to make it easier.

I feel I can see a shift in our system where people are [thinking], ‘Oh, maybe we should know where our food comes from’.”

A mixed-commodity farmer similarly said:

“It is a big ship to turn, right? But it is the consumers that are in the driver’s seat and what they demand, farmers will provide, and I just encourage all consumers to have a voice, like you know when A&W said they wanted free range animals, no hormones, whatever and a lot of cow farmers they were balking that, it is the feedlots, it is not the farmers, it is the feedlots because that means that they have to change the way they do their business ... so I applaud all the consumers that are making noise out there that they want safe, clean food. I encourage it.”

Consumer education and social connection were significant motivators for local farmers. Several producers discussed the benefit of consumers coming out to farms and learning where food comes from. Building relationships can help reduce consumers’ disconnection from food production. In general, farmers attest that a face-to-face interaction is powerful in getting people to change their habits. Consumers feel a deeper sense of connection to food produced by a person they have met compared to food produced by an anonymous person thousands of miles away.

Consumer education not only connects individuals to their food, but may also help consumers know *what* to demand. Without a direct connection to food production, producers said that people often misunderstand and are misinformed about labels, agricultural processes, and more. Producer knowledge and expertise must be recognized and valued, as opposed to a simplistic “customer is always right” mentality. The growing antibiotic-free movement was one example mentioned during interviews. Producers sympathized with people being opposed to overuse and non-discretionary use of antibiotics, but they still feel morally obligated to use them when animals have a treatable illness. However, with an increased demand for animal-based foods that are completely antibiotic-free, producers lose business. Before boycotting things altogether, production-side stakeholders emphasized the necessity of consumers understanding why producers make the decisions they do.

### Knowledge resources for local farmers

Knowledge and information are important for aspiring farmers and producers, for farmers shifting to local sale, and for those who wish to work on farms. Participants spoke about the need for information and mentorship. As noted below, there were repeated calls for a knowledge and information hub, which could guide prospective local producers through all the key steps, regulations, and available supports (e.g. grants). Events and programs that bring producers together, including mentorship programs, were valued both for information and the social connection and mutual support they provided. Some participants also mentioned training for farm workers. A market gardener stated that, “I think education, more accessible [and] better mentorship programs, [and] access to labour that was sustainable for my farm—that would be good. So those are the three things that would help me the most.”

## Role of health inspectors

Health inspectors may also have a part to play in lifting barriers to local food. Because many producers do not know the role of the inspector, they are not aware that health inspectors may help them set up a certifiable facility. Inspectors are familiar with the regulations for nearly all Saskatchewan facilities that serve and prepare food for the public. They can help inform producers about regional, provincial, and federal standards.

An inspector was asked what factors might encourage local production and processing. The response was that those doing inspections could be more upfront in sharing information to save producers on initial costs. Over time, producers diversify and expand their activities. Without knowing the health and safety requirements for each activity, they might invest in something that will be unusable after the expansion. The inspector offered the example of frustrated producers, who wonder why they were not told they would eventually need a three-compartment sink instead of a two-compartment sink.

## Organizations making change

Confronted with the need to coordinate local food distribution in Saskatchewan, several organizations have emerged with creative responses. Local & Fresh, a food hub and delivery service based in Regina, was created to address issues of supply predictability. For example, as a distributor noted, producers may be uncertain about the quantity of food required for a farmers' market stall and may be left "hauling back-and-forth and back-and-forth for not, in the end, being able to sell it." The idea with Local & Fresh, according to a distributor, was:

"To say that if you could introduce more predictability into the process by aggregating consumer demand into a nice efficient pile, you would be able to give the producer a better ability to plan and grow in a sustainable way. [That makes] the producer stronger and ... allows you to grow from there."

The Farmer's Table is founded on a similar idea, delivering sustainably produced food to consumers in several urban centres through an online ordering system. Several participants spoke about Prairie Fresh, a group of vegetable growers who cooperate to ensure volume and consistent supply to grocery stores.

Participants noted a future opportunity for government to support local producers by ensuring institutional procurement of local food. A vegetable producer stated:

"What I have always felt is if maybe the government's role would be encouraging institutions, encouraging businesses to support local products and get a higher percentage of local products within their cafeterias or whatever, and by doing that it creates the market... for the product. Then it will encourage producers to expand and to become more profitable."

An organic farmer also agreed that, “What I would love to happen is to have, say, the provincial legislature in their cafeteria have nothing but provincial foods—either organic or whatever—and it would make a statement and say, ‘okay, we are supporting our own producers’.”

Despite these positive developments and ideas, several producers talk about the barriers that continue to exist between consumers and local farming. First, the pace of modern life leaves families with little time to prepare and eat seasonal, local foods. Second, cheap imported food is convenient, and it can be difficult for consumers to give up that convenience. There is also a reported lack of knowledge about food itself, and its potential uses. Some producers have explained that if people better understood the things that are grown in Saskatchewan and what they might be used for, this could change the local market. Participants mentioned, for example, that the “meat and potatoes” diet common in Saskatchewan means that people may not know how to prepare other locally grown foods, such as lentils.

### Challenges for Local Farmers

Participants discussed the obstacles faced by farmers looking to produce locally, whether they are just starting up or looking to expand their market to a wider network.

#### Start-up costs

A number of participants discussed the challenges of first getting into the business of small-scale and local farming, such as the prohibitive initial investment that is needed to start up a market garden or local production site. This includes costs associated with installing irrigation systems, building cold storage for vegetables, acquiring land, and purchasing equipment. Faced with these costs, producers were either unaware if financial resources or programs existed to support them, or they were confident that the available financial supports were limited.

As Saskatchewan farms grow ever larger, land costs are also rising. This phenomenon leads to issues of land access, competition, and financial challenges for new or expanding farmers, as well as social disconnection in rural areas generally. One garden seed farmer explained that, “the distances between [people on small-scale farming operations] makes it really hard to build that community around what you are doing ... that really creates huge barriers to people accessing land who want to do good things with it.”

#### Support for smaller-scale production

Perhaps due to the dominance of large-scale and export-oriented agriculture in Saskatchewan, some participants noted that existing supports for farmers were often scaled to suit larger operations over smaller ones. An organic farmer and processor discussed the experience of trying to obtain a loan from a particular lender: “\$5 million is minimum that you can borrow through them. So, a small company like us, \$5 million is too much. We would need maybe a \$250,000 to get going but again where do you go?”. A local direct-marketer similarly noted that “there is no such thing as an ag program that is appropriately scaled or appropriately designed for me to use. It is all designed for somebody who is producing something large that they will export in large

amounts.” Similar statements were made by some processors, who felt that inspection requirements often assumed very large-scale production and high capacity.

### Access to markets

Another common theme was the challenge not only of starting up a farm, but of expanding an operation. There are challenges specifically involved in the local farmer’s market, as well as for those interested in getting their product into grocery stores.

#### *Farmers’ markets*

Several producers discussed challenges with the local farmer’s market. One barrier to participation is that producers must be based within a certain distance of the market. Farmers might find themselves within the range to sell at just one or two markets. If only a small number of people shop at those markets, it hardly makes the farmers’ travel worthwhile. Moreover, markets can be strict with these ranges. One farmer was frustrated that their application was rejected from a market for being located five miles outside of the accepted radius.

#### *Direct marketing*

Farmers frequently cited the direct marketing component as a challenge. Some, but not all, farmers are happy in the fields and preferred to not engage with customers on a weekly basis. Others found it overwhelming to manage both the farm operations and the direct sales. Export commodity producers can focus on growing, take their produce to wholesalers, and leave them for someone else to market. However, direct marketers’ livelihoods are directly tied to how well they can market what they produce. One producer expressed that this added complexity and pressure to the job.

#### *Grocery stores*

Obtaining access to grocery stores is a challenge for local farmers. As several producers explained, many grocers opt for a consistent supplier who can provide all year round. This often means importing from afar rather than drawing from local suppliers. Even producing a full twelve months of the year might not be enough to break into the “cut-throat” grocery store networks. According to a wholesaler, there is “very wide variance” of needs and quality standards among retailers, which producers must navigate. Grocers generally expect consistent, high volumes.

Aside from the challenges of selling to grocers, some producers are generally critical of the grocery-store model. Once secured, contracts with grocers can offer a significant income boost and relieve some of the pressures of direct marketing. All the same, grocery stores’ strict marketing standards often mean that substantial amounts of food are deemed low-grade and ultimately wasted.

### Processing challenges

Participants reported additional challenges for those looking to process their products locally. Labelling nutritional information, accessing certified kitchens, and obtaining health inspections are three key barriers.

While important for consumer safety and awareness, adding nutritional facts on value-added products requires a significant investment. A producer identified the barrier of investing in, and accessing, lab testing and software that generates nutrition facts. Working in a certified kitchen was also frequently mentioned as a barrier. These kitchens can be difficult to find, or the costs associated with them can turn people away from taking on commercial food preparation. As an alternative to commercial kitchens, producers can license their own home kitchens, but this limits what sorts of foods they are able to prepare for sale. Third, costly health inspections are needed when entering into formal markets. A distributor participant offered insight into the experience of vendors who sell at farmers' markets:

“There are quite a few limitations to what vendors can sell and mostly those limitations are around selling ready-to-eat food, prepared food items, and a lot of the things that the vendors would like to sell need to be sold frozen as opposed to fresh, and there are limitations to what people can prepare and sell from a home kitchen versus a licenced kitchen. So that can really limit a lot of vendors who don't necessarily have access to a licenced kitchen and even those vendors that do have access to a licenced kitchen still regularly have their products rejected by the health region and they are not able to sell them at market.”

## Infrastructure

### *Distribution and Transport*

Several producers noted the prohibitive costs of transportation for local food distribution. This challenge traces back to Saskatchewan's low population density. One dairy farmer and processor explained that, “Saskatchewan is so large and the population is quite spread out, so it is quite difficult to get your product to the consumers that are looking for it. We find that the farmers market in Regina does really well, but it is difficult to find other avenues of distribution for us.”

In addition, most of the transportation and storage networks that *do* exist are geared toward export crops. They are not necessarily equipped with the systems like cages, freezers and refrigeration that producers might need to keep dairy, poultry, fruits, vegetables, and other goods both fresh and marketable. These systems are also expensive, which represents another barrier.

A policy expert participant commented on another side of this challenge. A pilot project was designed so that a health care region could source locally grown food. Having little storage space, the health care region required small quantities delivered on a frequent basis. That additional transportation was a cost for the producer. In light of these inefficiencies, the participant recommended working to set up systems, such as warehousing, that reduce transportation costs as a barrier.

### *Lack of processing plants*

Meat producers, in particular, indicated that the challenges of transportation might be mitigated if there were more processing plants in Saskatchewan. Currently, having few processing options in the province necessitates transport between borders and differing regulatory standards. Some farmers find the closest processing facilities in a neighbouring province, but are then unable to sell the processed food back in Saskatchewan. Others are entirely unable to find production units or

packaging infrastructure within a reasonable distance. Lacking access to packaging facilities has substantial effects; without high-capacity storage or cooling systems, it shortens the window of time in which a producer must sell the product.

### Access to information

Whether in the process of starting up or expanding operations, local food producers consistently mentioned a lack of coordinated information. Participants spoke about not knowing which steps to take for local production and sale, or even how to find out about the next steps. Specifically, producers felt they lacked knowledge in finding who they should be contacting to enter local markets and where they should be looking for rules and regulations.

### Lack of marketing information

Producers reported having to learn about direct marketing on their own, without “any proper policy or processes and templates or anything”, as one farmer put it. For those who want to outsource that responsibility and focus on production, there is no information source that makes it clear which markets and what sorts of marketing assistance are available.

For exporters and local distributors alike, there is also the challenge of knowing how to appropriately price one’s product. With commodities like grain, producers have an entire year to sell a crop and must anticipate international prices. Other producers who distribute locally face price competition from importers. When choosing to pay seasonal workers a living wage, for instance, certain costs can only be driven so low to remain competitive, so pricing becomes a challenge in this way.

### Changing and contradictory health regulations

Participants often mentioned the lack of clear and consistent information about health inspection, and the specific requirements of certification. As one dairy farmer pointed out, sometimes there is conflicting information between health inspectors at different levels. The provincial health inspector and Canadian Food Inspection Agency representatives might say two different things, leading to confusion about which one takes precedence. In addition, these regulations are prone to change. This adds pressure on food processors, in particular, to keep up-to-date with food safety standards so that they can stay in business.

### Differing regulations across borders

Besides unclear regulations within one’s own jurisdiction, several producers discussed how regulations differ across municipalities. As an example, Regina’s regulation demands that meat sold within the city is processed by provincially inspected butchers. Saskatoon demands processing by federally inspected butchers, but there are no federally inspected plants in Saskatchewan.

Further, producers were frustrated that provincial inspections are not transferable. That is, a Saskatchewan producer selling provincially inspected meat to a Calgary restaurant would be considered illegal. Even when selling from municipality to municipality within Saskatchewan, one

local farmer admitted they were uncertain about whether or not they were following all the rules when selling directly to consumers:

“I might be going into a city where they have adopted a new bylaw that says you can’t bring meat into town that hasn’t been through a provincial inspected facility or something. It is hard to keep track of all those things. So the fact that legislation flows without thinking of us is a barrier”.

## Recommendations

### 1. Centralised Knowledge Source

One recommendation that continued to surface amongst stakeholders was the need for a centralised knowledge source, in which consumers can easily get access to information around local food and producers can learn about distribution and regulations. As it stands, compliance standards for production, processing, and retailing are found in different places and directed by different groups and different levels of government. An up-to-date, comprehensive website would be a low-cost way to clarify points of confusion. On the consumption side, some suggested compiling a list of producers, distributors, and markets to make it easier for individuals to source foods from local suppliers; the Direct Farms Manitoba website (formerly Small Farms Manitoba) was mentioned as a model in this regard.

### 2. Centralised Distribution Centre

Producers voiced support for a centralised distribution system. Based on the same logic that built Local & Fresh, The Farmer’s Table, and Prairie Fresh, producers need a way to meet volume and supply requirements while reducing the time and cost involved in marketing. A central distribution centre “matches the market to demand,” which is particularly helpful for farmers who are selling into large grocery networks with large orders, and who face losses if orders do not go through. A centre is also highly helpful for smaller companies located far from city centres. They can work together to share costs like warehousing and transportation. In effect, this makes distribution more efficient and far less expensive. A distribution centre could also benefit consumers. Locally grown food becomes more affordable as costs go down. Food quality also improves as the distribution networks become stronger and more efficient.

### 3. Government Supports and Start-Up Grant

Recommendations for the government covered several areas: provision of start-up grants, training and mentorship programs, sourcing local food in government facilities, and general promotion of local food.

For example, the government might take an active role in promoting local production by offering a start-up grant to new farmers engaging in value-add, direct marketing, CSAs, or other local initiatives. The nature and demands of the job often require that aspiring farmers either grew up on a family farm or were mentored under an experienced farmer. Grants could be connected to

mentorship opportunities to bring new and experienced local producers together. In addition to financial supports, training and mentorship programs were mentioned as potential government-driven initiatives. In the eyes of producers, Farm Credit Canada has been successful in offering support for young farmers. Participants emphasized that grants and other support programs must be appropriately scaled to smaller production levels and local sales. Government institutions themselves have significant purchasing power. As one farmer and distributor noted, government offices could “support local products and get a higher percentage of local products within their cafeterias” to take part in creating a local demand for locally grown foods.

#### 4. Support for Infrastructure

A key finding in this research was the need for more processing plants in Saskatchewan. Several producers discussed how this would reduce transportation costs and eliminate logistical complications associated with differing regulatory standards between provinces and municipalities. Supports for smaller-scale processors, including consistent information about health and safety regulations, could facilitate more infrastructure. Processing opportunities should be available to producers regardless of production level or size of operation.

#### 5. Education

Producers in this study identified the need for increased public education on food production and the detrimental effects of “cheap food” policy. Improved public understanding on how food is produced and the costs that go into this production can shift public perception of farmers and their products. Some participants also suggested more public education on how to prepare and consume foods which are grown, but currently not readily consumed, in Saskatchewan (e.g., lentils).

### Final Thoughts

Despite the evident challenges of local food production and sale in Saskatchewan, many producers spoke positively and optimistically about their role and contributions in the local food economy. Despite complexities involved in local sale, local producers noted the benefits of not being susceptible to international market fluctuations and currency exchange adjustments. There is also a shorter supply chain, and producers have a competitive advantage in the Canadian market due to a perceived “cultural shift [among Saskatchewan people] who want to support Saskatchewan-grown food.”

The list of reasons to produce and distribute locally goes on. Producers tend to follow an ethic of environmental stewardship and hope to reduce their carbon footprint. Moreover, many enjoy the rewarding face-to-face interactions with people, and they notice a superior quality that comes with careful growing and reduced transportation. There are reasons to be optimistic about the future of local food in Saskatchewan. A farmer who started nearly a decade ago has witnessed “a huge increase in awareness and an increase in the [number] of products. We are seeing some amazing products being produced in Saskatchewan that you would have never imagined possible... I feel like we have so much potential, and it is growing. I am really encouraged.”

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## Appendix: Interview Questions

### **I. Core Questions (all participants):**

1. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?
2. How would you define “local” food? [this is the definition we’ll work with throughout this interview]
- 3a. What factors currently encourage food producers to export their products?
- 3b. What factors currently encourage food producers to sell their food products locally?
4. What do you see as key barriers for selling food in local markets in Saskatchewan?
5. What are the top three factors that would encourage you to sell your products in local markets?
6. What factors would encourage you to produce for/process for/purchase food from local food markets?
7. How would you define “sustainable” food?
8. What changes would make our food system more sustainable? [use participant’s own definition of sustainability, whether economic, environmental, and/or social]
9. If you were a policy maker, what changes would you make to our system of food production, processing, and sales here in Saskatchewan?
10. What ideas for local food have you seen or heard elsewhere that might work well here?

### **II. Questions for Farmers:**

- F1. Please tell me a bit about your farm. How long have you been farming? What do you produce on your farm?
- F2. What is your biggest challenge as a farmer today?
- F3. If you could change any policies affecting agriculture right now, what would they be?
- F4. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?
- F5. We are interested in the journey food takes as it moves through the food system.
  - F5a. Where do your products get processed?
  - F5b. Where do they end up?
  - F5c. Tell me about how you transport your products.

- F6. What factors encourage farmers to produce for export / international markets?
- F7. How would you define local food? [this is the definition we will use throughout the interview]  
 F7a. [using their definition of local] What factors encourage farmers to produce for local markets?  
 F7b. [using their definition of local] Are there any barriers for producing food for local markets?
- F8. How would you define “sustainable” food production?
- F9. What changes would make agriculture more sustainable?
- 10a. How does international trade affect your business/work?
- 10b. Do international trade agreements affect local food in Saskatchewan? If so, how?
- F11. What is the ideal labour arrangement for your farm? What labour arrangement would be best for you? Why?
- F12. What ideas for local food have you seen or heard elsewhere that might work well here?

### **III. Questions for Policy-Makers:**

- P1. Please tell me about your position and your organization. What does your department or unit do? What is your role in relation to food policy?
- P2. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?
- P3. How would you define “local” food? [this is the definition we’ll work with throughout this interview]
- P4a. What policy factors currently encourage food producers in Saskatchewan (or Canada) to export their products?  
 P4b. What policy factors currently encourage food producers in Saskatchewan (or Canada) to sell their food products locally?
- P5. What do you see as key policy barriers for selling food in local markets in Saskatchewan?
- P6. What impetus would drive policy change toward a more local food system?
- P7a. Do international trade agreements or regulations affect the way food is produced or sold? If so, how?  
 P7b. Do international trade agreements affect local food systems? If so, how?

P8. How would you define “sustainable” food?

P9. What policy changes would make our food system more sustainable?

P10. What ideas for local food have you seen or heard elsewhere that might work well here?

#### **IV. Questions for Health Inspectors:**

H1. Please tell me about your position in your organization. What is your role, especially in relation to food?

H2. What is your biggest challenge as a health inspector today?

H3. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?

H4. What are the key characteristics of a healthy food system? A safe food system?

H5. How would you define “local” food? [this is the definition we’ll work with throughout this interview]

H6. Are there any barriers for people selling food in local markets in Saskatchewan? If so, what are they?

H7. What factors would encourage production and processing for local markets here in Saskatchewan?

H8. How would you define “sustainable” food?

H9. What changes would make our food system more sustainable?

H10. If you were a policy maker in your sector, what changes would you make to our system of food production, processing, and sales here in Saskatchewan?

H11. What ideas for local food have you seen or heard elsewhere that might work well here?

#### **V. Questions for Processors:**

PR1. Please tell us about your company and what you do.

PR2. What is your biggest challenge as a food processor right now?

PR3. Can you walk us through the journey of your food products?

- Where do the raw materials come from?
- Where do the final products get sold?
- Where do they travel before they reach their final destination?

PR4. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?

PR5. How would you define “local” food? [this is the definition we’ll work with throughout this interview]

PR6a. What factors currently encourage food processors to export their products?

PR6b. What factors currently encourage food processors to sell their food products locally?

PR7. Do you face any barriers for selling your product in local markets?

PR8. What are the top three factors that would encourage you to sell your products in local markets?

PR9. Is your industry affected by international trade agreements? If so, how? What are your thoughts on these agreements?

PR10a. How would you define “sustainable” food?

PR10b. What changes would make our food system more sustainable?

PR11. What changes would you make to our system of food production, processing, and sales here in Saskatchewan?

PR12. What ideas for local food have you seen or heard elsewhere that might work well here?

## **VI. Questions for Retailers:**

R1. Please tell me about your store and your position here.

R2. What is your biggest challenge as a food retailer right now?

R3. What are your views on our food system in general (here in Saskatchewan, Canada, or globally)?

R4. How would you define “local” food? [this is the definition we’ll work with throughout this interview]

R5a. [Using their definition of local] Do you sell any local products in your store?

R5b. Please tell me more about those local products:

- What products are they?
- Where are they from?

- Approximately what % of your products is local?

R6. What are the “pros” and “cons” of selling locally produced food products, compared to products from international markets?

R7. Can you tell me about any challenges you’ve experienced with selling locally produced food products? Any stories to share?

R8. Can you tell me about any challenges you’ve experienced with selling food from international markets? Any stories?

R9. What are the top three factors that would encourage you to sell local food products?

R9a. How would you define “sustainable” food?

R9b. What changes would make our food system more sustainable?

R10. If you were a policy maker, what changes would you make to our system of food production, processing, and sales here in Saskatchewan?

R11. What ideas for local food have you seen or heard elsewhere that might work well here?