



— ONTARIO —

Bring Home the World

A Report on Ontario's World Foods

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Message From the Minister



Ontario is home to the most culturally diverse population in Canada.

Our government recognizes and celebrates this diversity, which strengthens our communities and helps to build a stronger, healthier Ontario.

From globally inspired restaurant menus to retail grocery aisles and farmers' markets, consumers, retailers and the agri-food sector are all hungry to get more world foods on Ontarians' plates.

This trend makes for exciting times, filled with new opportunities to continue to strengthen and grow our agri-food sector, which already contributes over \$37 billion to our gross domestic product, employs more than 800,000 people and is creating good jobs across the province.

This strategy builds on our government's efforts to promote the good things that are grown, harvested and made in Ontario through our *Local Food Act, 2013* and Local Food Strategy. Through this strategy, we are placing an even greater focus on how we can promote and help expand consumer access and availability of locally grown world foods.

As part of the process to expand the production and sale of world foods across the province, we sought input on how we can make it easier for Ontarians to *Bring Home the World*. I would like to thank everyone who participated and shared suggestions on how to best move forward with the initiative.

The innovation and ingenuity that I see on farms, in food plants, in grocery stores and at farmer's markets is heartening, and I am confident our sector will capitalize on the opportunities for growth that this strategy presents.

Premier Wynne has challenged our agri-food sector to double its annual growth rate and create 120,000 jobs by 2020. Thanks to your efforts we are on track to meeting the challenge, with 57,900 jobs being created since the challenge was launched.

By 2050 the world population will rise to 9 billion, and Ontario will be called upon to step up to the challenge of helping feed the world. We have the people, drive and opportunity to help meet this demand while satisfying diverse global tastes. I look forward to working together to implement this strategy, which will strengthen our sector, boost our province's economy and create good jobs in communities across the province.

The Honourable Jeff Leal
Minister of Agriculture, Food and Rural Affairs
Minister Responsible for Small Business



Introduction

For thousands of years, people and food have migrated around the globe. Explorers and settlers have taken plants and animals from where they originate to the far corners of the world and adapted them to local conditions. Nurturing new and different tastes in new places — or bringing a bit of home to a new land — has a long tradition.

In this day and age, people and commodities travel quickly around the globe, speeding up the demand for world foods. Taking advantage of this emerging trend is Ontario's farmers, food processors, distributors, food service operators and restaurants, who are diversifying their offerings.

For example, few know that Ontario has become the largest North American producer of ginseng. Approximately 85 per cent of ginseng grown in North America is sold to the Asian market.¹

Ontario's diverse population has roots in 200 countries from around the world, and the province's rich farmland already produces more than 200 types of foods. More and more, Ontarians can enjoy locally

grown and produced foods that are traditionally imported from around the world, including okra, Asian eggplant, lassi and shrimp.

But more can be done. Promoting these kinds of foods and increasing access to them are the goals of the province's *Bring Home the World* campaign, part of our Local Food Strategy. Only by working together will we bring more locally grown and processed world foods to markets, grocery stores and dinner tables across the province.

To kickstart the *Bring Home the World* campaign, the government reached out to consumers to ask what they thought of world foods and how much interest there is in locally grown products. Industry was also asked how they plan to help supply the market.

During discussions held through the summer of 2017, the government heard from more than 350 Ontarians. This report summarizes what we heard from consumers and industry, which will help inform future actions to make world foods a larger part of strengthening the province's agri-food sector and the economy.

1 Agriculture and Agri-Food Canada



Why World Foods?

Growing numbers of newcomers are creating new market opportunities for locally grown and processed world foods. People of South Asian, Chinese and Afro-Caribbean heritage typically consume more fresh vegetables and spend more of their household income on fresh produce.² The top world crops in demand include okra, eggplant, bitter melon, bok choy, Chinese broccoli and callaloo. Also, newcomers within the GTA consume six to ten times the amount of mutton and goat consumed by the average Canadian.³

The potential for tapping into this market is huge. There are 800,000 Canadians of South Asian descent in the Greater Toronto Area who are spending as much as \$33 million a month on specialty vegetables, almost all of which are imported.⁴

The shifts in Ontario's population are resulting in a more diverse consumer palate. As newcomers have increased the demand for, and supply of, world foods, many others have developed a taste for them too.

An expanding consumer base is increasing demand for more world food options. In fact, the majority of Ontario shoppers have reported that they would cook internationally flavoured cuisine more often if

the ingredients were readily available at their local grocery store.

In response, Ontario farmers and processors have diversified their offerings. While there has been a recent upswing in interest, some world foods have been grown and sold in the province for decades — bok choy and napa cabbage to name just two.

More recently, growers are starting to plant non-traditional crops which have been tested by researchers at the Vineland Research and Innovation Centre and OMAFRA to flourish under Ontario conditions. For example, approximately 2,900 acres of specialty brassicas (napa cabbage, bok choy, etc.) are produced in the province, with a farm-gate value of more than \$15 million.⁵

2 FarmStart study of GTA, 2010

3 2014 study by the Ontario Sheep Marketing Agency and the Ontario Livestock Alliance

4 Univeristy of Guelph

5 Statistics Canada, 2015

While farm and food suppliers are adjusting to meet new tastes and trends, grocery retailers must rely on imports from California, Mexico and South America to meet the huge demand.

In fact, Ontario imported more than \$10 million worth of okra and more than \$20 million worth of all varieties of eggplants in 2016 alone.⁶

Branching out production and processing in the province to meet the needs of Ontario's diversity will provide the agri-food sector with more options for generating greater economic returns.

A better understanding of the demand for world foods by Ontarians could spark a quicker shift to a wider range of agri-food products that provide new opportunities for the entire agri-food value chain, including consumers.

Vineland Research and Innovation Centre

With support from *Growing Forward 2 (GF2)*, Viliam Zvalo, a research scientist at the Vineland Research and Innovation Centre, has been conducting trials to see if okra and two eggplant varieties (Asian long and Indian round) can be grown under Ontario conditions.

Farmers in Ontario and across the country have been planting and harvesting many types of world crops and some developing market linkages with, grocery chains like Sobeys, Loblaw and Metro that are eager to supply their customers with a taste of the world that's grown fresh here at home.



6 OMAFRA trade statistics, 2016



Consultations: Who and How

In order to develop a forward-looking plan, the province needed to first consult with the people who would be participating in this new world foods venture.

To that end, a discussion paper was released that outlined the changing demographics in Ontario, highlighted recent government initiatives in support of world foods, and identified new economic opportunities.

Participants were asked to identify themselves as either a consumer or industry representative (producer, processor, retailer, distributor, food service business).

About three quarters were consumers and a quarter were from industry.



The majority of respondents to the survey (80 per cent) were born in Canada, and just over 55 per cent of respondents identified as second-generation immigrants. Respondents born outside of Canada came from countries including India, China, Germany, Brazil, Japan, Iran, France and Jamaica. The world food preferences of respondents are reflected in the following map:



KFI Inc.

KFI Inc. of Brampton received over \$80,000 from the Local Food Fund to market its ready-to-use Indian cooking sauces through trade shows, in-store samplings, a redesigned website and television advertisements. As a result, more than 155,000 customers were reached. In addition, the project helped generate increased sales of more than \$1 million and created two full-time, four part-time and two temporary jobs.





What Does it Mean?

Getting the basics right meant determining what locally grown world foods actually means to people. The government's discussion paper defined it as **foods that can be produced, harvested or processed in Ontario that reflect the diversity of the province's population**. World foods can also be part of an internationally inspired recipe using locally sourced ingredients, or part of a culturally important or religiously required diet, such as halal-processed foods.

Consumers who participated in the online survey defined world foods as food that is common to and originates from other countries and cultures and is not traditional in the province but is grown, harvested and raised locally in Ontario. Consumers associated locally grown world foods with particular attributes such as being fresher, safer, healthier, more flavourful and of higher quality compared to imported foods.

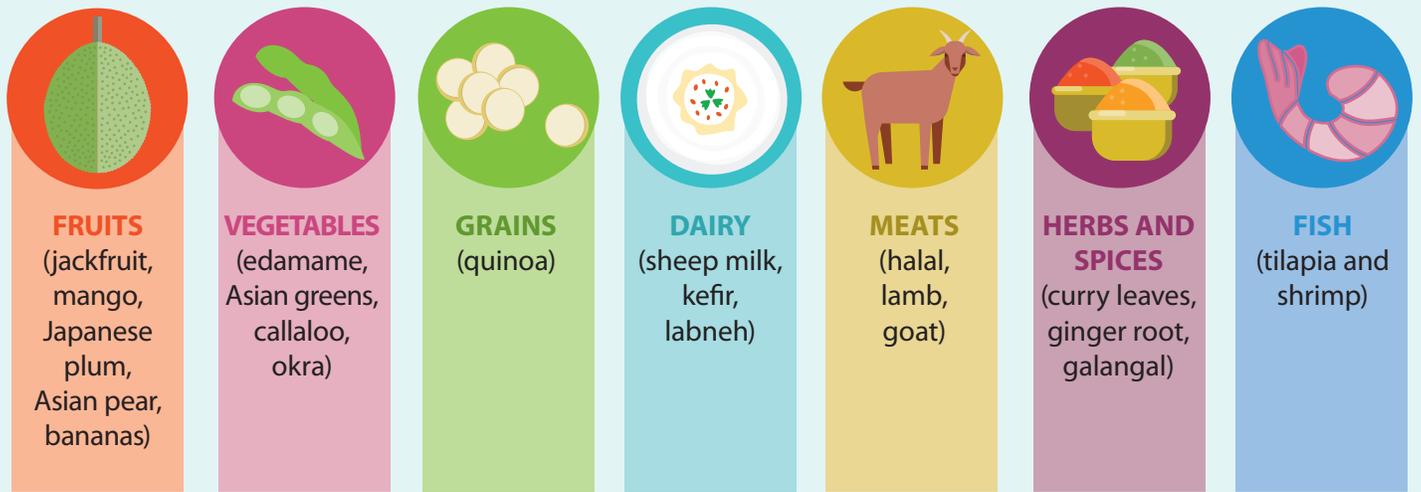
They noted that by growing more world foods, the province would have a greater variety of foods available, reflecting the diverse tastes that appeal to Ontario's multicultural society. Some linked world foods to supporting local farmers and the local economy, as foods that are not transported long distances, and referred to their environmental benefits, especially in terms of generating a smaller carbon footprint.

Industry participants responding to the survey also defined locally grown world foods as foods that are popular in other countries and cultures but are grown, harvested and produced in Ontario.

Respondents also described world foods as being **culturally diverse foods** that are popular and commonly consumed in other countries and cultures, not traditionally common to the Canadian diet or cuisine but can be grown and accessed locally.

Locally grown world foods were also described as foods that offer more **choice and variety** (e.g., taste and culinary experiences) in meeting market demands within the province.

Consumer and industry respondents associated world foods with specific types of foods



Pyramid Ferments

Pyramid Ferments of Prince Edward County, a 2016 Premier's Award for Agri-Food Innovation Excellence regional winner, developed a tonic that is simply the brine left over from its main activity: producing kimchi, sauerkraut and other fermented foods. This probiotic-rich tonic punches up the levels of healthy bacteria in the digestive system. The product proved so popular at farmers' markets that the company is now marketing to retail outlets and discussing partnerships with juice companies. This former waste product accounted for 23 per cent of sales in 2017, and retail sales of Gut Shots are expected to double in 2018.





Consumer Feedback

Demand

The vast majority of consumer respondents (78 per cent) indicated they buy locally grown world foods either weekly or occasionally. Fresh fruits, vegetables and dairy products are the most commonly purchased kinds of world foods, followed by meats, fish, eggs and other processed foods (e.g., sauces, snack foods and beverages) as highlighted in the following graphic:

Types of world foods consumers are purchasing



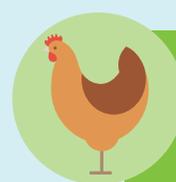
93%

Fruit &
Vegetables



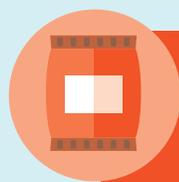
71%

Dairy



53%

Meat, Fish
& Eggs



34%

Ready to
Eat Foods



52%

Other
Processed
Foods



3.5%

Do Not
Purchase
World Foods

Consumers reported they were able to list a range of world foods they think are grown and made in Ontario, including goat, ginger, quinoa, edamame, kefir, shrimp and eggplant, to name a few.

The bottom line is consumers are hungry for locally grown world foods, with 63 per cent of respondents saying they either grow them at home (e.g., in a backyard garden), or currently do not grow them but would be interested in learning how.

Access

Knowing where people currently buy world foods is the key to developing plans for increasing access.

Under the province's Local Food Strategy there are a number of advancements taking place that are doing

just that. There are more farmers' markets and on-farm markets carrying more products like local wines, fruit wines and hard ciders. These beverages are also now available in grocery stores.

More schools, universities, hospitals and other institutions are choosing Ontario-grown and -made products to serve their students, patients and employees. Municipalities are getting on board as well, developing local food charters and mapping out strategies to boost access to local foods.

Consumers who filled out the world foods survey said they most often purchase imported or locally grown world foods from conventional grocery store chains. Discount grocery store chains and farmers' markets were also identified as key consumer access points.

Where Consumers are Accessing World Foods



Note: 13 per cent of respondents selected other (e.g., backyard garden), three per cent selected never purchase world foods. Consumer feedback also suggested accessing imported world foods is easier than accessing locally grown, and that it is easier to access world foods in urban areas than in rural parts of the province.



Industry Feedback

Determining what people in the industry think of locally grown world foods is also crucial to being able to move forward with the campaign. Respondents were specifically asked what their thoughts were on how the supply chain is being supported, and the opportunities and challenges that might be encountered in expanding access to these foods in the future.

Thirty per cent of those surveyed said they produce, process or sell locally grown world foods and 60 per cent said they didn't.

Twenty per cent said they would be interested in producing or processing these kinds of foods and twelve per cent said they'd like to increase the supply of locally grown world foods for their wholesale, retail or food service business.



Munye Kitchens

Thanks to the province's Local Food Investment Fund, Munye Kitchens of Toronto received nearly \$24,000 to create a local food e-guide for multi-ethnic African communities to increase awareness of locally grown foods relevant to the African communities and identify where Ontario-grown produce can be purchased. The project will also educate consumers on how to use African crops like okra and callaloo, grown in Ontario.

World Foods in Ontario – At a Glance

The following table outlines a snapshot of what was learned during the consultation, what challenges were identified, what the opportunities are, and what government programs and tools are already available to meet the challenges and take advantage of the opportunities.

Challenges	Current Work and Supports	Opportunities
<p>Ontario’s growing season makes year-round availability difficult. There’s limited information about how to grow new world crops, minimal registered pest control products and long distances to markets. There’s also a lack of connections to markets.</p>	<ul style="list-style-type: none"> • The Vineland Research and Innovation Centre is working on identifying how to grow, harvest, store and market more world foods. It is currently running a program called Feeding Diversity: Bringing World Crops to Market which focuses on developing world crops such as okra and Asian eggplant varieties that can be grown in Ontario. • Agronomic research reports on many world crops are available from Agriculture and Agri-Food Canada, OMAFRA and the University of Guelph. • OMAFRA’s fruit, vegetable, and greenhouse production guides (Publications 363, 838, 360, 371) contain production and pest control product information for some world crops. • OMAFRA’s New Directions Research Program and the OMAFRA-University of Guelph Research programs fund research projects including the development of world foods production and marketing information. OMAFRA has provided roughly \$5 million in support for 97 research projects over the last 20 years. • Specialty Croppportunities, OMAFRA’s online resource, helps Ontario farmers identify opportunities to grow specialty crops, including world crops. 	<ul style="list-style-type: none"> • Explore additional opportunities to develop new crop best management practices, with co-operative efforts from OMAFRA technical staff, academic institutions, industry associations, growers, processors, retailers, and end users. • Influence future research calls to include a focus on world food: supply chain management, cost of production, pest management, crop production, markets and food safety requirements. • Learn from research knowledge already generated. • Develop new academic and workforce expertise in Ontario world foods. • Continue research in ginseng production, new market opportunities and the health of sheep and dairy goats. • Provide continual updates to current crop profiles and adding new profiles to OMAFRA’s Specialty Croppportunities online module as information is developed or made available.



Challenges	Current Work and Supports	Opportunities
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Supply chain development, or matching producers to buyers, including a need for more growers who produce sufficient volume and consistency of product for buyers. In addition, a lack of information on how to store, transport and cook world foods.

- Making a Case for Growing New Crops is an online learning resource developed by the Agri-Food Management Institute (AMI) to provide farmers with information about business planning, marketing a crop, finding buyers and locating processors. The AMI worked with the Ontario Federation of Agriculture and OMAFRA specialists to develop the tool and the project was partly funded through an investment from *Growing Forward 2* (GF2) (see below).
- Investments have been made through cost-share funding assistance programs: OMAFRA's Local Food Fund, the federal-provincial GF2 program, and the Greenbelt Fund's Local Food Investment Fund. Many of the projects supported through these programs are helping to build the supply chain.
- Since 2013, more than \$7.6 million has been committed to more than 110 projects that support world food, through programs like the Local Food Fund and GF2. In addition, \$460,000 has been approved through the Local Food Investment Fund for 14 world food-related projects.

- Explore how consumers' and communities' cultural and religious dietary preferences can be met through more locally grown world foods.
- Explore how blockchain (a shared and distributed database/record-keeping system) can be used in Ontario to provide traceability and authenticity to the food supply/value chain from the farm gate to consumers' plates.
- Explore opportunities to continue the momentum and support further investments in the world food value chain.

High costs of production (labour, energy, fertilizer, pesticides) and risk.

- OMAFRA's Agricultural Business Management website provides farmers with help to manage their business.
- An online guide called Starting a Farm in Ontario – Business Information Bundle for New Farmers provides resources for potential new farmers and newcomer farmers. A Business Resource Guide is also available in six different languages.

- OMAFRA staff will continue to support producers through world crop workshops, field demonstration sites, demonstration days, and presentations.

Challenges	Current Work and Supports	Opportunities
<p>Communities lack knowledge in identifying world crops as an emerging opportunity for their local agri-food sector within the context of their broader economic development planning.</p>	<ul style="list-style-type: none"> • OMAFRA's Agriculture Economic Development Guidebook is a resource to help communities and regions integrate the needs and opportunities of farmers and food producers into their larger economic development strategies. 	<ul style="list-style-type: none"> • OMAFRA staff will continue to work with local economic development officers (EDOs) to increase awareness of world food demand and opportunities for local production and processing.
<p>Inexpensive imports make local food less price competitive for consumers.</p>	<ul style="list-style-type: none"> • The Beyond Production Agriculture Business Information Bundle helps farmers and others who want to add value to raw commodities. Examples include fruit that's made into jams and jellies or grains that are ground into flour. • The Premier's Awards for Agri-Food Innovation Excellence recognizes local agri-food businesses and individuals who are adding value to existing products helping create jobs and economic growth. In 2017, a new category was added: response to expanding consumer tastes (e.g., locally grown and produced world foods). Since 2013, 19 world food-related projects have been recognized. 	<ul style="list-style-type: none"> • Explore immigration trends and ways to help newcomers with cultural food exchanges and job opportunities. • Continue promoting the Premier's Award for Agri-Food Innovation Excellence program, which now recognizes world food innovations.
<p>Limited awareness by consumers of locally produced world foods.</p>	<ul style="list-style-type: none"> • Foodland Ontario is promoting Ontario-grown world foods. Examples include TV advertising in 19 languages on a multicultural station, recipes and newsletters distributed to approximately 600 food and lifestyle media, social media activities and the Foodland Ontario calendar. 	<ul style="list-style-type: none"> • Explore increasing marketing and promotion in value-added products, agri-tourism, crop diversification, niche products and restaurants.

Challenges

Too much government regulation (e.g., labelling) and too little program support (e.g., lack of insurance).

Current Work and Supports

- Ontario passed the *Cutting Unnecessary Red Tape Act, 2017* in November of 2017 to help reduce regulatory costs, align standards and help small businesses grow while also protecting the public.
- The Crown agency Agricorp offers crop insurance on 25 different world crops including bok choy, specialty eggplant, oriental radishes and sweet potato.

Opportunities

- Continue listening to the agri-food sector's business needs.
- Ontario will continue to work with industry and government partners to explore opportunities to expand production insurance coverage for more types of agricultural products including world crops. It is expected that funding will continue to be available to help emerging sectors better understand their production risks and investigate new risk management tools.



Sol Cuisine

Sol Cuisine, from Mississauga, received over \$68,000 from *Growing Forward 2* for the implementation of equipment, facility upgrades and process consulting to expand market opportunities for its organic, vegetarian, Kosher, Halal, gluten-free tofu, falafel, veggie burgers and veggie dog food products.



Moving Forward and a Call to Action

The government is a strong supporter of the province's \$37-billion agri-food sector. It's one of the most important economic drivers and contributes to a high quality of life by providing good jobs and safe food, including world foods.

Ontario is well positioned to take advantage of the growing interest in world foods. Researchers have demonstrated that the province's climate, soil and geography are suited to producing some crops that have traditionally been grown only in other parts of the world.

Ontario's agri-food sector is forward-looking. Farmers and food processors are showing their innovative and entrepreneurial skills in bringing these foods into the marketplace.

Consumers have said there is an appetite for world foods and have indicated their hunger for more.

Moving ahead, the industry — from farm gate to retail — would benefit from more information and resources in order to be better equipped to manage new crops and world foods.

For world foods, as for all of the agri-food sector, the government invests in programs to promote innovation and productivity for farms and food processors, supports research, provides technical advice along the agri-food value chain, and works with its partners in the sector to reduce red tape.

The province will continue to work with partners in identifying the kinds of world foods that can be grown here. Additional effort will be made in developing tools and resources that will further support the sector, including better understanding how to grow world crops in Ontario conditions and sell them in the domestic marketplace.

Through Foodland Ontario and other means, more will be done to educate consumers about the products already available. Increased effort will be put into heightening farmers', processors' and retailers' awareness of the opportunities to be had in world foods.

Delivering on the province's commitments to support local food — including world crops — is helping meet the Premier's Agri-Food Challenge, which is to double the sector's annual growth rate and create 120,000 jobs by 2020.

Since issuing the challenge, over 57,900 jobs have been created and more than \$3.4 billion has been added to the economy.

Building a stronger agri-food industry is part of the government's economic plan to support a dynamic and innovative business climate, invest in people and invest in infrastructure.

Together, producers, processors, retailers, consumers and government can celebrate and support increasing the diversity of all the good things that grow in Ontario.