

**SALT SPRING ISLAND
LOCAL PRODUCE STUDY: FINAL REPORT**

**Written by Patricia Reichert
for
Island Natural Growers
Gulf Islands Chapter of Canadian Organic Growers**

November 2005

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EXECUTIVE SUMMARY

In March 2005, Island Natural Growers launched an eight-month study of commercial produce agriculture on Salt Spring Island. This report presents the results of the study and summarises the data. The report discusses the key findings and recommends immediate to longer-term actions designed to strengthen and support produce agriculture on Salt Spring.

The broad goal of the Local Produce Study is to contribute to increasing Salt Spring Island's food self-sufficiency by improving produce production and the coordination of produce storage, distribution and marketing. The study focused on produce grown primarily for sale including all vegetables, fruits, nuts, pulses and other edible crops sold for human food such as mushrooms and culinary herbs.

The study was precipitated by a number of factors: the closure of the Growing Circle Food Co-operative, a key retail outlet on Salt Spring for marketing local produce; the development of a local energy strategy; a growing interest in food security and self-sufficiency; and various practical issues including farmers' distribution, marketing and storage needs.

This was a community-based project. A Steering Committee of Island Natural Growers' members was responsible for project oversight and an Advisory Committee provided insights and advice from the perspectives of growers, retail grocers, restaurateurs and other stakeholder groups. A project coordinator and community researcher conducted the research. Many volunteers helped with data collection. The project was funded by the Islands Agri-food Initiative with matching funds from Island Natural Growers, the Capital Regional District, the Islands Trust and individual donations. The Islands Farmers Institute contributed in-kind support.

Study Methods

- An extensive survey of commercial produce farmers covering a wide range of topics: the amount of farmland in production, zoning, variety and volume of produce grown, farming practices, marketing venues and satisfaction, storage facilities and needs, interests in increasing production and associated obstacles, interest in coordination. In all, 44 commercial produce farmers participated in the survey. It is estimated that those who were surveyed represent about 95% of all the commercial produce producers on Salt Spring.
- A survey of shoppers at the Tuesday Farmers Market.
- A general survey of shoppers at the three main grocery stores in Ganges.
- Interviews with retail grocers and selected restaurant owners.
- Mapping of farmland in produce production.

There is a summary of survey data in Part 4 of the report and Appendix 1 presents the draft maps.

Key Findings

Based on a thorough analysis of the data, there are eight key findings. The findings have significance for the agriculture sector on Salt Spring and the community as a whole. They are discussed in full in Part 3 of the report.

1. ***The amount of farmland on Salt Spring Island in commercial produce production in 2004-2005 is only a small proportion of total active farmland on the island. There is, however, significant potential for increased produce cultivation on Salt Spring.***
 - There are approximately 90 acres of farmland in commercial produce production on Salt Spring. This represents only about 6% of the total acreage on produce farms. It

represents about 1% of total active farmland on the island and less than 1% of the total land in the Agricultural Land Reserve on Salt Spring.

2. ***Commercial produce farmers on Salt Spring Island are growing only a very small proportion of the total amount of produce that people on Salt Spring purchase in a year.***
 - In 2004, commercial producers grew in the range of 232,700 pounds of produce. This volume comprises: 129,220 pounds of vegetables including culinary herbs; 102,180 pounds of fruit; and 1,270 pounds of nuts in the shell.
 - Using Statistics Canada data for the statistical standard of fresh produce availability in Canada, we can impute that Salt Spring farmers are growing enough fresh vegetables to supply about 418 people in a year and enough fresh fruit to supply about 675 people in a year. This represents only about 4% and 7%, respectively, of the Salt Spring population.
 - Based on general estimates, it is likely that the total volume of Salt Spring commercial produce represents less than 5% of all the produce brought onto the island for sale by grocers.
3. ***Salt Spring commercial produce farmers are growing a wide range and bountiful array of produce, asparagus to zucchini.. The variety gives encouragement to the notion that there is good potential for Salt Spring produce to meet a significant proportion of the nutritional needs and culinary tastes of the community. However, there are two main issues: insufficient quantities as noted above and most of the produce is available only through the spring, summer and early fall.***

Farmers identified 26 different types of vegetables and 13 types of fruits that they are growing commercially. (See data tables in Part 4.) Although the data show that most growers use greenhouses to extend the season, winter production is very low, limited in quantity and variety.

This seasonality in commercial production creates a significant gap in the availability of local produce. It also poses a significant challenge in terms of developing techniques and practices that will ensure the viability of winter cultivation at a level that is feasible for a commercial enterprise.

4. ***60% of the commercial produce farmers involved in this study expressed an interest in increasing their vegetable and fruit production; 38% expressed an interest in reintroducing grains for human food into their production mix. There are, however, obstacles that affect the feasibility of expansion.***
 - Shortage of farm labour — Farmers said there is a lack of skilled farm workers. And many said if there were workers there is a serious lack of affordable housing on the island for the workers to live in.
 - Lack of appropriate mechanization — The issue of a shortage of a reliable and skilled supply of farm labour, is made more acute by the fact that the vast majority of commercial producers do most of their work by hand and are already working to full capacity at current levels. This study found that only about 15% of the farmers are using mechanized methods to any significant extent.
 - Business planning — Increasing production involves addressing questions related to the availability of capital, financing options, and ensuring that net income increases sufficiently to warrant the investment.

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- Market access— While many producers expressed concern about whether and how they would be able to market any increase in production, the three major grocers on the island indicated that there is plenty of room in the market for good quality local produce. All said they would have purchased more this summer. In some cases, they were referring to specific specialty crops such as berries and in other cases it involved a full range of vegetables from tomatoes through to potatoes.
- Pricing— Grocers indicated that the price of local produce is often—not always—significantly higher than what *most* of their customers are able or willing to pay. They suggested that increased production could provide significant opportunities for economies of scale that affect pricing while ensuring that all parties in the system—the farmers—the retailers—the general public—benefit.
- Public support— In a survey of Salt Spring shoppers, 93% said they think the quality of local produce is good; 74% said it is important that by buying local produce our community reduces the use of fossil fuels required to transport produce onto the island; and 80% said it is very important that we grow more of the produce we eat on Salt Spring.

Despite their strong indication of support for local produce agriculture, 59% of the shoppers indicated that local produce makes up less than 25% of the total amount of produce they purchase. And most of these said it comprises less than 10% of their produce purchases.

The reality of this shopping pattern was born out by the relatively small number of local residents who patronized the Tuesday Farmers Market during the summer of 2005.

5. The results of the study are inconclusive regarding producers' storage needs.

A majority of producers reported that they have adequate storage on their farms but said this will change if they increase production. There is a possibility that central storage could be developed in the context of the development of the Murakami agri-industrial project on Rainbow Road, a possibility has been included in the discussion paper that has gone forward to the Agricultural Commission.

6. Incomes from commercial produce on Salt Spring Island are not adequate to provide a full-time income but they are increasing.

- 75% of the farmers who participated in the study said their earnings from produce production make up less than 35% of their total family income.
- 68% of the producers said the income from commercial produce sales is important to them and 63% reported that their income from produce sales is increasing.
- 55% said they consider their farming to be a business and many of the remaining farmers said their farming is only a sideline because the income it generates is so low.

7. Commercial produce farmers are continuing to farm over the long-term.

- On average, commercial produce farmers have about 10 years of farming experience on Salt Spring with the range being 1 year to 28.
- About 25% of the commercial produce farmers have five or fewer years farming experience.

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The mixture of long-term and new farmers is encouraging for the continuing viability of produce farming on Salt Spring Island. A significant concern in keeping farmers and bringing new farmers into production and holding them for the long-term is the high cost of land on Salt Spring. This is a factor that affects the whole community if food production and self-sufficiency are valued and to be given greater priority.

8. *A strong majority (92%) of commercial produce farmers on Salt Spring are interested in exploring ways of coordinating various aspects of operations with other producers.*

Overall, interest in exploring ideas and options for coordinating various functions related to their production and marketing is sufficiently strong to warrant follow-up. It is strong enough to signal an important opportunity for produce production on Salt Spring Island.

Recommended Actions

While this study is completed, the larger project of supporting and promoting produce agriculture on Salt Spring Island is ongoing. The report recommends actions that will help to move this objective forward.

Immediate and Short-term Actions (December 2005 to June 2007)

1. Communicate the results of the study to the community-at-large.
2. Present the results of the study to selected Salt Spring Island groups who share an interest in food security and agriculture sustainability in order to discuss and plan opportunities for complementary actions, e.g. the Islands Farmers Institute; the Islands Trust; the Capital Regional District; Salt Springers for Safe Food; the Energy Strategy group; the Salt Spring Island Conservancy.
3. Participate in the Farm Area Plan initiative with the Island Farmers Institute, providing information from the study and developing policies and practices that support local food production.
4. Organise a meeting of commercial producers who indicated that they are interested in increasing production. This is a group of about 26 farmers. One of the main purposes of the meeting will be to discuss the feasibility of increasing commercial production on Salt Spring Island by 15% each year for the next five years. This would bring production to 276,600 lbs in the first year; 318,100 in the second year and so on.

Other topics that would be discussed at the meeting are:

- organizing some equipment and tool sharing.
- coordinating pick-up and transportation for wholesale distribution.
- creating a shared-facility for value-added production; e.g. 1) a central washing and packaging facility for greens—for distribution to restaurants, grocers, caterers; 2) a central apple juicing facility.
- increasing certified organic production as a value-added feature.
- coordinating information about current/week-by-week crop availability in order to make it easier for food service buyers to source upcoming harvests.
- organising a residential box delivery service.
- innovative ideas for on-farm storage.
- potential need for centralized storage.

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5. Investigate the potential for changing the location of the Tuesday Farmers Market to Centennial Park, where it will be more central and more visible.
6. Organise a series of workshops for produce farmers, in consultation with the Farmers Institute. Suggested topics:
 - Hands-on training in the use of labour-saving devices and techniques
 - Farm business planning and financial management training; assessing economic feasibility of various types of decisions focusing on expansion and diversification
 - Wholesaling your produce: making changes in order to sell to grocers and restaurants; produce preparation, packaging/boxing; pricing; predicting demand; invoicing.
 - Expanding direct on-farm marketing.
 - Winter growing at a commercial level.
7. Research the availability of machines and tools that are appropriate to the scale of farming on Salt Spring and that would improve work efficiency on commercial produce farms.
8. Organise a meeting of the relevant producers to share the grain production data and to facilitate planning the actions they would like to take.
9. Facilitate a meeting(s) with interested producers, grocers and restaurateurs to explore options for test projects in the spring-summer-fall of 2006.
10. Apply for funding to assist in coordinating the implementation of this action plan and to cover the costs of those items that have organizational expenses associated with them.

Longer-term Actions (June 2006 forward)

11. Facilitate as appropriate in assisting appropriate actions agreed to at the producers planning meeting (#4 above).
12. Monitor land-use for commercial produce production, documenting changes in the amount of land in production year-over-year 2005 to 2010.
13. Monitor commercial produce production, documenting changes in the amount of produce grown year-over-year from 2005 to 2010.
14. Monitor progress on the Murakami agri-industrial development and assess opportunities.
15. Continue work on the Farm Area Plan and any action and monitoring that flows out of the planning process.
16. Monitor need to facilitate the organization of a farmer-controlled coordinated system for marketing their produce.
17. Continue working with the organizations identified in #2 to implement coordinated plans that promote and increase food self-sufficiency on Salt Spring Island.

Conclusion

This study began with an emphasis on assessing and addressing the marketing, distribution and storage needs of commercial produce producers on Salt Spring Island. As the study got

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underway and data began accumulating, a picture of the small amount of farmland in commercial produce production and the low volume of commercial produce that is actually being grown on the island began to form. When the data collection was complete the analysis showed:

Commercial produce acreage is only about 1% of the active farmland on Salt Spring and the volume of produce, while varied and of high quality, is sufficient to supply only between 4% and 7% of the island population.

The study found that producers are, for the most part, selling all of their crops. And, at this volume at least, most prefer to sell retail rather than wholesaling. At the same time, retail grocers and some restaurants reported that they are not able to source an adequate supply of quality Salt Spring produce to meet their requirements. At present Salt Spring produce represents only about 5% of all the produce being transported onto the island.

Clearly, the island is not even close to growing enough produce to feed the population. Changing this situation would mean significantly increasing production. The study found that there are a number of commercial farmers interested in doing this. If this is to happen, however, many obstacles will have to be addressed including: improving the efficiency of farm work through appropriate mechanization; business planning to ensure financial sustainability; and engaging the community in supporting local food security with their food dollars.

The original research conducted in the course of this study provides the baseline data that is needed to measure changes in produce production and assess two and five years from now whether we are doing a better job of feeding ourselves than we are today.

PART 1 SCOPE OF THE STUDY

This project was initiated by Island Natural Growers (ING) in response to a strong push by many Salt Spring Island farmers to address a range of produce production, marketing and storage needs on the island. The timing of the study was precipitated by a number of factors:

- the closing of the Growing Circle Food Co-operative in October 2004, a retail grocery outlet on Salt Spring that specialized in selling local produce;
- growing support for the development of an energy strategy for Salt Spring which includes reducing the amount of fossil fuels required to transport food onto the island;
- growing interest in increasing the island's food self-sufficiency; and
- growing interest to preserve, protect and support local agriculture.

As the discussion among growers about alternative marketing mechanisms evolved following the closure of the Growing Circle, more and more questions about the longer-term viability of commercial produce production on the island emerged. At ad hoc meetings it was decided that Island Natural Growers would design a coherent study of the many and varied issues associated with longer-term planning.

It was agreed that there were very few facts about commercial produce production on Salt Spring. Therefore, an essential part of the study would be to gather a reliable base of agricultural information upon which to build a strong and sustainable plan for produce production on Salt Spring Island.

GOAL OF THE PROJECT: To increase Salt Spring Island's food self-sufficiency by improving produce production and the coordination of produce storage, distribution and marketing.

DEFINITION OF PRODUCE

In all aspects of the study, produce was defined to include all vegetables, fruits, nuts, pulses and other edible crops sold for human food such as mushrooms and culinary herbs.

The study focused on produce grown largely for commercial purposes—that is, grown to be sold on a retail or wholesale basis.

OBJECTIVES:

- Conduct a producer survey that provides basic information about the amount of commercial produce grown on Salt Spring Island.
- Through the involvement of Salt Spring Island grocers, restaurant owners and caterers, determine the amount of produce that is being brought in from off-island.
- Determine Salt Spring Island's potential for produce production by reviewing the island's agricultural land base.

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- Determine the current awareness among the general public of local produce and its availability.
- Determine the best marketing strategies for wholesale and retail sales.
- Determine the economic feasibility of a cold storage and central sorting produce facility for the island.
- Assess if a coordinator position is economically and strategically appropriate in order to optimise produce sales for small-scale producers and to meet the demand for large quantity orders.
- Develop two and ten-year action plans for the produce production component of food self-sufficiency for Salt Spring Island.

PART 2 HOW THE STUDY WAS CONDUCTED

FUNDING

The project was funded through a combination of sources:

- ❑ Islands Agri-Food Initiative
- ❑ Capital Regional District
- ❑ Islands Trust
- ❑ Island Natural Growers
- ❑ Individual donations
- ❑ 250 hours of volunteer labour

COMMUNITY RESOURCES

- ❑ The project was managed by a Steering Committee of four individuals who donated their volunteer labour to oversee the operation of the study.
- ❑ An Advisory Committee was established to provide guidance on carrying out various aspects of the study. This committee included producers, retail grocers, a representative of the Island Farmers Institute, an Islands Trust representative and several interested individuals with various expertise.
- ❑ The Island Farmers Institute provided in-kind support for the study, including free use of the Institute's meeting facilities.
- ❑ Many volunteers assisted in carrying out the study, including overseeing the study as mentioned above, helping to conduct the surveys and helping with the test market project.

TIME FRAME

The project was conducted between March and November 2005.

STUDY METHODS

The study has produced a broad range of information about produce agriculture on Salt Spring Island. The study was conducted using the following methods:

- A survey of commercial produce farmers on Salt Spring Island. This survey covered a range of topics including: amount of land in produce cultivation; the area and volume of each type of produce in cultivation; farmland zoning; farming methods; sources of water; farm labour and farming business; marketing methods and satisfaction with various sales venues; storage and storage needs; interests in increasing production; and coordination interests. The survey also included questions about producers' potential interest in reintroducing grain production for human food to the island. The survey was conducted by telephone and took, on average, 60 minutes per respondent.

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- Individual interviews with retail grocers on Salt Spring Island.
- Individual interviews with a selection of restaurant owners/chefs on Salt Spring Island.
- A test market pilot using the Tuesday Farmers Market on Salt Spring Island.
- A survey of shoppers at the Tuesday Farmers Market.
- A survey of the general public having to do with shopping patterns and opinions about local produce.
- Compilation of information on local produce projects in other locations.
- Mapping of farmland in produce production on Salt Spring Island.
- A comprehensive analysis of all the survey data, including an analysis of storage requirements and options.
- A workshop with produce farmers who participated in the study. The data collected through the course of the study was presented at the workshop and possible actions were discussed.
- Development of recommended actions based on the issues identified in the study. The action plan was informed by the workshop discussion and analysis of all the information gathered in the course of the study.

PART 3 STUDY RESULTS: WHAT DID WE LEARN?

The study produced a large volume of previously undocumented information about produce farming on Salt Spring Island. This original research provides a baseline for assessing the adequacy of produce production on the island and for measuring changes in production and the use of agricultural land over time.

The study has produced valuable information about the marketing of local produce from the perspectives of the producers, the retail grocers and other food service buyers, and from the perspective of the general public. (Complete data tables are presented in Part 4.)

This part of the report outlines the key findings and presents them in a manner that is in keeping with the goal of the project—that is:

to increase Salt Spring Island's food self-sufficiency by improving produce production and the coordination of produce storage, distribution and marketing.

KEY FINDINGS

- 1. The study found that the amount of farmland on Salt Spring Island in commercial produce production in 2004-2005 is only a small proportion of total active farmland on the island. It found that there is a large potential for increased produce cultivation on Salt Spring.***

Results of the producer survey show that only about 92 acres of farmland are in commercial produce production on Salt Spring. This represents about 1% of the total amount of active farmland (9600 acres) on Salt Spring Island and about 6% of total acreage on the farms that are currently engaged in commercial produce production (1440 acres). (Table 2 in Part 4 summarises the zoning of the land.) The map appended to this report illustrates the agricultural land on the island and the areas that are currently in produce production.

Sixty percent (26) of the farmers who responded to the survey said they are interested in increasing production, some by increasing intensity and some by bringing additional available land on their farms into production.

- 2. The study found that commercial produce farmers on Salt Spring Island are growing only a very small proportion of the total amount of produce that people on Salt Spring purchase in a year.***

In 2004, commercial producers grew in the range of 232,700 pounds, or just under 105,800 kilograms of produce. This volume comprises: 129,220 pounds of vegetables including culinary herbs; 102,180 pounds of fruit; and 1270 pounds of nuts in the shell. (See also Tables 3 and 4 in Part 4.)

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The information about production volumes was supplied by producers, themselves, most of whom keep good records. As a result, while not absolute, these volumes are reasonably reliable estimates of the volume of local commercial produce that is available for sale either directly from farmers or through various retail outlets.

There are two perspectives for assessing the relative significance of this quantity of produce in the food supply for the island.

- 1) One is to compare the volume of produce commercially produced on Salt Spring to the estimated amount of produce that is made available per capita in Canada.

Statistics Canada estimates that in 2004 there were about 309 pounds of fresh vegetables and 151 pounds of fresh fruit commercially available per person in the country as a whole. This represents total weight including waste and spoilage. It includes both Canadian grown and imported produce.

Based on this statistical standard of fresh produce availability, we can impute that Salt Spring farmers are growing enough fresh vegetables to supply about 418 people in a year and enough fresh fruit to supply about 676 people in a year. This represents only about 4% and 7%, respectively, of the Salt Spring population.

The supply of apples, which are considered to be in great abundance on the island, brings the insufficiency of the supply of produce into closer focus. Information provided by farmers indicates that in 2004, the commercial harvest of apples on Salt Spring was in the range of 50,000 pounds. This is the equivalent of about 5 pounds of apples per capita.

- 2) A second perspective from which to assess adequacy is to compare the volume of commercially grown local produce to the total amount of produce that is stocked by all the retail grocers on Salt Spring Island.

For proprietary reasons, the study was not able to collect data from the retail grocers about the exact volume of produce that each handles. The information they did provide in interviews and their best estimates, however, suggest that local produce comprises a very small proportion of the total volume that is stocked by retailers to meet island demand. The total quantity is in the millions of pounds. It is estimated that all the local commercially grown produce on the island comprises only about 5% of all the produce that is stocked.

That is, if all the produce grown commercially on Salt Spring—the total 232,700 pounds—were sold at the grocery stores it would replace only 5% of

all the produce sold there. We know from survey information that the actual amount that is sold through local grocery stores is even less than this—likely less than 2%.

3. ***Salt Spring commercial produce farmers are growing a wide range and bountiful array of produce. The range literally spans A to Z—asparagus to zucchini. While some of the vegetables and fruits are more difficult to grow than others the variety gives encouragement to the notion that there is good potential for Salt Spring produce to meet a significant proportion of the nutritional needs and culinary tastes of the community. There are major issues, however, not just in terms of insufficient quantities as noted above but also in terms of seasonal availability. Most of the produce is available only through the spring, summer and early fall.***

Farmers identified 26 different types of vegetables and 13 types of fruits that they are growing commercially. (Table 4 in Part 4 lists the top 10 vegetable crops and top 5 fruit crops.) While a small amount of the produce is available through most of the year and most growers use greenhouses to extend the season somewhat, there is not a lot of produce commercially available between October and April. Winter production is very low, limited in quantity and variety. Even varieties of greens which grow relatively easily in this climate are in very short supply during the winter months.

This seasonality in commercial production creates a significant gap in the marketing and availability of local produce. It also poses a significant challenge in terms of developing techniques and practices which ensure the viability of winter cultivation at a level that is feasible for a commercial enterprise.

4. ***Sixty percent of the commercial produce farmers involved in this study expressed an interest in increasing their vegetable and fruit production; 38% expressed an interest in reintroducing grains for human food into their production mix. They also, however, identified several obstacles that affect the feasibility of expansion. The study found that while there is significant potential for increasing produce production on Salt Spring Island it will require careful planning involving farmers, grocers and other food service buyers and the general public.***

80% of the producers in the study said that access to farmland is not an obstacle to increasing production. The majority did, however, identify other factors that they feel are an obstacle. (See Tables 9 through 11 in Part 4.) Overall, the study found that there are several significant and complex issues that need to be considered and addressed for any practical expansion to take place.

- 1) Shortage of farm labour

Most survey respondents said that the shortage of labour is not just a matter of hiring someone on a casual basis to do odd jobs but rather finding workers who have a basic knowledge of farming and the skills to work independently. Many said that associated with the lack of skilled workers is the lack of

affordable housing on the island for the workers to live in. These issues go beyond the scope of what individual farmers can do to address labour force needs.

2) Lack of appropriate mechanization

The issue of a shortage of a reliable and skilled supply of farm labour, is made more acute by the fact that the vast majority of commercial produce farmers are mostly dependent on hand labour to carry out their work. This study found that only about 15% of the farmers are using mechanized methods to any significant extent. The majority of farmers—85%—are doing almost all their work by hand. If farm work is to become more mechanized it would require sourcing machinery that is suitable to the smaller scale of production on Salt Spring.

3) Business planning

On a practical level, hiring more labour and/or mechanizing requires careful business planning. Such a plan must address questions related to the availability of capital, financing options, and ensuring that net income increases sufficiently to warrant the investment.

4) Storage

The majority of producers in the study said that for the most part they have adequate on-farm storage for their current crops. Most, however, said they do not have extra storage that would accommodate increased production. The study information is inconclusive on what the type and amount of this extra storage should be. Producers said this would depend on which vegetables and fruits are grown in greater quantities.

5) Market access

Seventy percent of the farmers said they felt that access to markets would be an obstacle if they increased production. That this would be a problem was not born out by other information. The study found that all three of the major produce grocers on the island were not able this past summer to source all the local produce that they were willing to purchase from local farmers. In some cases, this involved specific specialty crops such as berries and in other cases it involved a full range of vegetables from tomatoes through to potatoes.

In interviews, the grocers indicated that in their experience there is an insufficient supply of good quality local produce for them to purchase on a wholesale basis. They said that often, with some notable exceptions, producers want to sell to them only when they have excess. This is consistent with information from producers. The majority of farmers said they prefer to sell their produce directly to consumers rather than wholesale. And 98% said they rarely if ever have excess. The grocers were unanimous in explaining that buying excess puts them in a difficult spot, because such a supply is unreliable and often of poor quality.

The farmers who sell regularly to the grocers said they have no trouble selling all they can supply. These farmers and the grocers both indicated that they value a good working relationship. A small number of restaurants also indicated having a good working relationship with a handful of farmers who supply them with a selection of produce through the summer. Some said they would buy much more if the supply was available.

6) Pricing

Grocers indicated that the price of local produce is often—not always—significantly higher than what *most* of their customers are able or willing to pay. This is less an issue for produce that fills a niche market than it is for items that are staples in every family’s food basket. They reported that pricing is especially an issue when local produce sits side by side with produce brought in from other places, including other parts of British Columbia. As long as the supply is so low there is little that can be done about this. They suggested that increased production could provide significant opportunities for economies of scale that affect pricing while ensuring that all parties in the system—the farmers—the retailers—the general public—benefit.

7) Public support

The respondents in a survey of shoppers, all of whom were residents of Salt Spring, indicated that they value locally grown produce (See Tables 18 through 22 in Part 4):

- 93% said they think the quality of local produce is very good or good;
- 93% said they buy some local produce on a regular basis through the summer and fall;
- 68% said it is very important that local produce be organically grown;
- 74% said it is important that by buying local produce our community reduces the use of fossil fuels required to transport produce onto the island; and
- 80% said it is very important that we grow more of the produce we eat on Salt Spring.

Despite this overall strong level of support for local produce agriculture, however, 59% of the respondents—a clear majority—also indicated that local produce makes up less than 25% of the total amount of produce they purchase. And most of these said it comprises less than 10% of their produce purchases.

The reality of this shopping pattern was born out by the relatively small number of local residents who patronized the Tuesday Farmers Market during the summer of 2005. (See Tables 15 through 17 in Part 4.)

The Tuesday Market was started two years ago by Island Natural Growers and is held in the United Church meadow every week from July to October. It is a

market made up entirely of local food growers and processors. The philosophy behind the market is that Salt Spring is large enough to support a farmers-only market. The idea is that holding such a market mid-week makes it easier for island residents who find the crowds at the Saturday Market too overwhelming. It also makes it easier for small growers to set up and sell their wares.

This year, as part of this study, an advertising campaign was launched to promote the Tuesday Market. A coordinated effort was made to encourage as many food producers as possible to set up at the market and the administration was kept very straightforward in order to facilitate their involvement. Despite the increase in vendors compared with last year and the ad campaign, however, the number of shoppers and the volume of purchases was low. So low, in fact, that it puts the future of the market for next year in serious question. A survey of shoppers at the Tuesday Market indicates that shoppers spent on average just over \$14.00 each Tuesday spread among 2 and 3 different vendors.

5. *The results of the study are inconclusive regarding producers' storage needs.*

As has already been stated, a majority of producers have adequate storage. The minority that do not have a wide range of crops and it is not clear if a small amount of on-farm storage could easily fill most of this need. There is a possibility that central storage could be planned in the context of the development of the Murakami agri-industrial project on Rainbow Road. This possibility has been included in the discussion paper that has gone forward to the Agricultural Commission. Follow-up is best integrated into planning for increased production.

6. *Incomes from commercial produce on Salt Spring Island are not adequate to provide a full-time income, but they are increasing.*

Three-quarters of the farmers who participated in the study said their earnings from produce production make up less than 35% of their total family income. At the same time, 55% said they consider their farming to be a business. About 42% of the farmers who participated in the study said their farming is only a sideline but many of these said this is only because the income it generates is so low.

Despite the low incomes, though, 68% of the producers said the income from commercial produce sales is important to them. 63% of the farmers also reported that their income from produce sales is increasing.

7. *Commercial produce farmers are continuing to farm over the long-term.*

The study found that, on average, commercial produce farmers have about 10 years of farming experience on Salt Spring. The range in years of farming experience on the island was 1 year to 28 years. At the same time, about 25% of the commercial produce farmers have five or fewer years farming experience.

This finding means that while there is a very stable group of longer-term farmers there is also a significant number of newer farmers joining the ranks. This is very encouraging for the long-term viability of produce farming on Salt Spring Island. It also poses a challenge to ensure that these newer farmers stay in the business; that they receive good mentoring to increase their skills and that they believe that farming can provide them with an adequate standard of living.

A significant concern in bringing new farmers into production and holding them for the long-term is the high cost of land on Salt Spring. It is high both in terms of initial outlay and return of investment. This is a serious problem that affects not just farmers but the whole community if food production and self-sufficiency are valued and to be given greater priority.

8. *A strong majority (92%) of commercial produce farmers on Salt Spring are interested in exploring ways of coordinating various aspects of operations with other producers.*
- 66% of producers said they are interested in exploring ways of coordinating the promotion and marketing of local produce;
 - about 50% said they are interested in looking at options for coordinating storage;
 - almost 50% expressed an interest in the possibilities of coordinating transportation, sharing equipment and coordinating wholesale distribution;
 - fewer expressed an interest in sharing inputs, such as compost, or coordinating crop planning; and
 - a small number said that shared land use may be of interest to them.

Overall, interest in exploring ideas and options for coordinating various functions related to their production and marketing is sufficiently strong to warrant follow-up. It is strong enough to signal an opportunity for produce production on Salt Spring Island.

PART 4 DATA REPORTS

This part of the report highlights key aspects of the data that was collected. It is divided into four sections.

SECTION 1 PRODUCERS SURVEY RESULTS

- It is estimated that this survey includes data on 95% of the commercial produce farms on Salt Spring Island in 2005. The target population for the survey was all of the farmers on Salt Spring Island who are growing produce specifically for the purpose of selling it. The survey was not intended for people growing backyard gardens for their own use or who sell some produce from time to time when they have excess.
- The target population was identified using the Island Farmers Institute Directory, the Island Natural Growers membership list, the producers who sell at the Saturday Market, a list of producers who had sold at the Growing Circle Food Co-operative, and word-of-mouth.
- In total, 67 Salt Spring Island farmers were contacted as potential respondents; 44 of these were identified as commercial produce farmers; 41 completed the survey and partial data was collected on 3 additional commercial produce farms for a total of 44 farms; 2 commercial produce farmers declined participation.

Commercial Produce Farmland

Table 1 shows that the study documented the total acreage and the acreage in commercial produce on 44 farms. It is estimated that these farms comprise about 95% of all commercial produce farms on Salt Spring Island.

Table 1 Number of acres of farmland in commercial produce production, Salt Spring Island, 2004-05

Number of farms	Total farm acreage	No. of acres in vegetables	No. of acres in fruit	No. of acres in nuts	No. of acres in other edible crops	Total no. of acres in produce
44	1440 acres	39.7	47.3	3.6	1.6	92 acres (6% of total acreage)

Highlights

- About 90% of the farmers own the land they are farming. The remaining 10% either rent the land they are farming or are farming in a shared owner-tenancy arrangement.
- The farms range in size from .5 of an acre to 200 acres; the median size of the farms is 10 acres.

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- 41% (18) of the farms are 5 acres or smaller; 27% (12) are 25 acres and larger; 16% (7) of the farms are over 100 acres.

Table 2 Zoning of the farmland farmed by commercial produce farmers, 2004-05

Agriculture Land Reserve (ALR)	ALR + Rural	ALR + Rural & Residential	Rural	Watershed	Residential & Residential + Rural	Unknown	Total
550 acres	299 acres	117.7 acres	287.5 acres	47 acres	9.7 acres	128.9 acres	1440 acres

Highlights

- At least 69% of the commercial produce farmland is zoned completely or partially in the ALR. Another 20% of the land is zoned rural
- Since the majority of farms are in the Agriculture Land Reserve (ALR), predictably, the most common type of soil on the farms is loam. Many of the farms have a combination of soil types with clay and loam being the most common. It was common for respondents to indicate that their land has both well-drained and wet spots.
- About 55% of the farmers are using wells to water their produce crops and 47% use ponds. A few of the farmers (less than 15%) also use creek, lake, waterworks and/or spring water. Only 20% of the farmers said they use catchment tanks. One farmer indicated using only rain water.

Produce Crops

The commercial produce farmers were asked to identify the main produce crops that they grew in 2004, to estimate the weight of each crop and the area of farmland that each is grown on. Based on the data they provided, **Table 3** estimates the total production of commercial produce on Salt Spring. It must be noted that these are gross volumes, including amounts suitable for eating as well as spoilage and waste.

Table 3 Estimated commercial produce production on Salt Spring Island, 2004*

	Cultivated Area (acres)	Estimated Weight of Production (lbs/kg)	Production Ratio
Vegetables	40 (44%)	129,220 lbs (58,736 kg) (55%)	3230 lbs/acre
Fruit	47 (52%)	102,182 (46,446 kg) (44%)	2174 lbs/acre
Nuts	3 (4%)	1,270 (577 kg) (1%)	423/acre
Total	90 acres	232,672 lbs (105,760 kg) 100%	2585 lbs/acre

*Does not include culinary herbs.

The study found that commercial producers are growing about 26 types of vegetables, 13 types of fruits and two nuts—walnuts and hazelnuts. **Table 4** lists the crops that are

grown in concentrated amounts by several farmers. Some of these crops are also grown in smaller quantities by other farmers.

Table 4 Top 10 vegetable crops and top 5 fruit crops harvested on Salt Spring, 2004

Crop	Weight	Estimated Acreage
Vegetables		
Salad crops & lettuce	32,300 lbs.	.95 acres
Tomatoes	8,715 lbs.	1.3 acres
Garlic	7,750 lbs.	2.45 acres
Carrots	6168 lbs.	1.2 acres
Winter squash	4750 lbs.	3 acres
Potatoes	4032 lbs.	.92 acres
Asparagus	3,765 lbs.	.82 acres
Cucumbers	3,740 lbs.	.61 acres
Beets	3172 lbs	1.2 acres
Onions	2670 lbs.	.53 acres
Sub-total	77,062 lbs.	13 acres
Fruits		
Apples	48,540 lbs.	7.6 acres
Grapes	23,500 lbs.	8 acres
Strawberries	4,400 lbs.	2.35 acres
Plums	3,250 lbs.	1.8 acres
Melons	3,000 lbs.	1.12 acres
Sub-total	82,690 lbs.	21 acres

Highlights

- The top ten vegetables comprise 60% of the weight of all vegetables grown commercially. These crops are grown on just 33% of the total vegetable acreage.
- Five fruit crops comprise 80% of all fruit grown by commercial produce farmers, with apples weighing in as the top crop. These crops grow on 45% of the total fruit acreage.

Farming Practices

As the crop data show, produce cultivation is very intensive (see Table 3). **Table 5** shows that most of this work is done by hand. It also shows that while most farmers said they are using organic methods less than one-quarter of them are certified organic.

Table 5 Summary of farming practices

Half or mostly mechanised	Mostly hand labour	Certified Organic	Organic (not certified)	Use chemicals
15%	85%	23%	60%	20%

Highlights

- A small number of the farmers said they are using complementary methods to organics including permaculture, biodynamic, natural and/or veganic growing methods.
- 70% of producers said they use a greenhouse for various purposes and 34% said they use the greenhouse year-round.
- On average the producers have been farming almost 11 years on Salt Spring, ranging from 1 year to 28 years.
- 66% of the growers have done all their farming on Salt Spring.
- Some of the growers bring 20 years experience and more from farming elsewhere.
- 26% of commercial produce growers have 5 or fewer years experience as farmers.

Farming Business

Highlights

- 76% of farmers said that their income from produce sales is less than 35% of their total family income; 11% said it represents up to 75% of their family income; and 5% said it is more than 75% of the total family income. 8% of respondents declined to answer this question.
- 63% said their income from produce is increasing; 24% said it is staying the same; and 11% said it is declining.
- 55% of respondents said they consider their farming a business or vocation; 42% said they consider it a sideline. Several in this latter group said their aim is to increase the significance of their produce production.
- 34% said that the income from produce is very important to them; 34% said it is somewhat important; and 32% said it is not important, indicating that they have other main sources of income.
- 45% of respondents said that the produce they grow supplies more than one-half the produce they eat in their home; 40% said it is less than one-third.

Marketing

The survey heard from producers that they rarely have excess produce; that is, they are able to market most if not all the commercial produce they grow. Overall, only 2% of respondents in the survey said that they regularly have excess produce and most of the excess is apples.

The survey went on to ask producers how they marketed their produce in 2004, what venues they used and their satisfaction level with those venues.

Highlights

- Almost all of the producers indicated that they used more than one venue and many used several.
- The two most commonly used venues in 2004 were the Growing Circle Food Co-operative and individual farm stands.

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- A significant minority of producers sell at the Saturday market and do direct farm sales to individuals on Salt Spring.
- 67% of producers reported that they wholesale at least some of their produce. This includes marketing to grocers, restaurants and caterers. The volume of sales, however, varied widely. Some said they wholesaled as little as 1% of what they grow while others said wholesaling is the mainstay of their farm business.
- About one-third of producers said they also wholesale off-island, mostly venues on Vancouver Island and a few on the mainland.

Table 6 shows the estimated volume of produce sold through the different venues in 2004. It shows the significance of each venue to those who marketed their produce through this means. For example, the weight of produce sold directly from farms in bulk represents 25% of the total volume of produce sold in 2004—an estimated 47,148 pounds—and it represents 40% of the total volume of produce sold by the producers who sold produce using that method.

Table 6 Estimated proportion of commercial produce sold through various venues by Salt Spring commercial producers in 2004

Venue	Estimated proportion of total produce sold by all respondents	Estimated volume of produce sold by respondents	Estimated average proportion of the total volume individual producers sold in 2004
Direct bulk farm sales without farm stand	25%	47,148 lbs	40%
Saturday Market	19%	36,535 lbs	54%
Farm Stand	11%	21,230 lbs	35%
Tuesday Market	3%	6,000 lbs	12%
CSA	0.5%	975 lbs	13%
Sub-total	58.5%	111,888 lbs	
Ganges Village Market	9%	16,600 lbs	21%
Growing Circle Food Co-operative	9%	16,538 lbs	27%
Thrifty Foods	8%	14,846 lbs	18%
Natureworks	1%	2,016 lbs	5%
On-island Restaurants	3%	6,170 lbs	16%
Direct to Caterers	0.4%	800 lbs	25%
Sub-total	30.4%	56,970 lbs	
Off-island (grocers, restaurants, direct sales)	11.0%	20,922 lbs	27%
Total	100%	189,780 lbs	

Table 7 Producers’ satisfaction with the marketing venues they used in 2004

Venue	Very satisfied	Satisfied	Not satisfied
Saturday Market	58%	25%	17%
Tuesday Market	33%	44%	22%
Farm stand	46%	46%	
CSA	25%	75%	
Ganges Village Market	25%	50%	25%
Thrifty Foods	17%	83%	
Natureworks	17%	83%	
Growing Circle Food Co-operative	21%	58%	21%
On-island restaurants	44%	56%	
Direct to caterers	50%	50%	
Other on-island (direct farm)	58%	42%	
Off-island	20%	80%	

Highlights

- Commercial producers sell almost 60% of all their produce directly from the farm, at markets and farm stands. Only 30% is sold through local grocers, restaurants and caterers.
- Table 7 shows that, for the most part, produce farmers have found means of selling their produce that are satisfactory to them. In general, those who sold through the Saturday Market and those who sold bulk quantities directly off their farm tended to be more satisfied with these venues.
- On average, producers who sold to grocers were only somewhat satisfied with the arrangements in 2004. This was as much the case for those who sold through the Growing Circle Food Co-operative as it was for those who sold through the other grocers.
- The survey asked respondents a set of questions aimed at learning more about producers’ perceptions of wholesaling to grocers. Key results:
 - 69% of all producers in the survey agreed strongly or somewhat with the statement that “Wholesale pricing is too low to cover my costs.”

- Most (61%) said that meeting quality standards when wholesaling to grocers is not a problem. A significant minority (42%), however, indicated that preparing the produce and doing the delivery is too time consuming.
- 37% of producers said that supplying the quantity of produce required by grocers is not a problem at all; in contrast, 24% of producers agreed strongly with the statement that supplying the large quantities is a problem.
- A majority (68%) of producers were of the opinion that they prefer to sell their produce directly to consumers rather than wholesaling it and 56% indicated that it is easy to sell it all directly.

Table 8 Number of producers who use various different types of marketing tools (N = 38)

Marketing Tool	Number	Marketing Tool	Number
Word-of-mouth	38 (100%)	SSI Fall Fair	10 (26%)
Personal contacts	37 (97%)	Certified organic logo	6 (16%)
Farm logo	16 (42%)	Simply Salt Spring logo	5 (15%)
Farm tours	15 (40%)	Posters	5 (15%)
Island Natural Growers Guide	15 (40%)	Conservation Partner logo	3 (8%)
Farmers Institute Directory	14 (37%)	Brochures	3 (8%)
Business cards	14 (37%)	Website	2 (5%)
Festivals (e.g. Apple, Lavender)	11 (29%)	Fresh from the Island logo	2 (5%)
Newspaper ads	10 (26%)	Direct Farm Marketing Guide	1 (3%)

Increasing Production

An important part of the survey was to gather information about the potential for increasing commercial produce production on the island and the issues that producers face in doing this.

To begin, producers were asked if they are interested in increasing the commercial produce production component of their farm business. Sixty-two percent (26) said they are. Most of these (20) said they would like to do this by increasing the intensity of their current land use while 17 said they would also or only want to do this by cultivating more land. This could be land that is suitable for cultivation on their own farm or it could mean acquiring access to more land off their current farm.

When asked what crops they would grow if they did increase production, the respondents identified a full range of produce from root vegetables and garlic through to herbs,

eggplant, and peppers. They also expressed an interest in increasing production of a wide variety of fruits including apples, Asian pears and various berries.

Table 9 Number of Salt Spring commercial producers interested in increasing production, 2005 (N = 42)

Total number interested in increasing production	Number wanting to increase intensity	Number wanting to increase land in production
26 (62%)	21 (50%)	17 (41%)

The survey asked producers to rate possible obstacles that they might experience in increasing production.

Table 10 Obstacles to increasing production (N = 26)

Possible Obstacle	Significant Obstacle	Somewhat of an obstacle	Not an obstacle	N/A
Availability of/access to agriculture land	1 (4%)	3 (12%)	21 (81%)	1 (4%)
Availability of resources to bring land into production	2 (8%)	11 (42%)	11 (42%)	2 (8%)
Availability of financing	4 (16%)	11 (42%)	8 (31%)	3 (12%)
Availability of farm workers	9 (35%)	8 (28%)	8 (31%)	1 (4%)
Availability of farming information	1 (4%)	4 (16%)	19 (73%)	2 (8%)
Availability of equipment	2 (8%)	7 (27%)	16 (61%)	1 (4%)
Availability of quality water	3 (12%)	6 (24%)	16 (61%)	1 (4%)
Access to marketing opportunities	4 (16%)	14 (54%)	7 (27%)	1 (4%)
Availability of storage	7 (27%)	15 (58%)	3 (12%)	1 (4%)
Security of land	2 (8%)	2 (8%)	20 (77%)	2 (8%)
Other*				

* Other obstacles identified by respondents: physical health; effective irrigation system; high interest rates; regulations that are obstacles to infrastructure development; costs of increased; not enough time.

Highlights

- **Table10** shows that the most significant obstacle the farmers identified was availability of farm workers.
- The next most frequently identified obstacles were access to marketing opportunities and availability of storage.
- For 80% of those who are interested in increasing production, availability of or access to agricultural land was not seen as an obstacle.

Growing Grains

As part of gathering information about producers’ interests in increasing their produce production, the survey asked respondents specifically if they were interested in growing grains for human food. Such grains were grown on the island many years ago and this set of questions explored the possibilities for regenerating this type of production.

A total of 16 producers indicated that they would like to explore the possibilities of growing grains. Taken together, producers estimated potential for putting more than 100 acres into grain production. **Table 11** summarises the grains that they indicated were of most interest and the number of acres that they would consider putting into grain production.

Table 11 Potential grain production

Number of acres	Grains
10 to 11 acres	Heritage wheat; barley; anything else that grows well
2 to 3 acres	Heritage wheat; soybeans; both malting & milling barley; hemp; sweet corn
2 acres	Heritage wheat; oats; emmer; wild rice; malting barley
5 acres	Heritage wheat; oats
2 acres	Heritage wheat; rye; kamut; amaranth; milling barley; golden flax; buckwheat
10 acres	Heritage wheat; both malting & milling barley; oats; anything that grows well
10 acres	Undetermined
10 to 20 acres	Durum; is the climate right for other grains?
15 acres	Heritage wheat; rye; milling barley; oats
Undetermined acreage	Heritage wheat; kamut; quinoa; amaranth; millet; buckwheat
5 acres	A rotation of grains
8 to 10 acres	Soybeans; others that grow well
1+ acre	Anything that grows well
20 acres	Anything that grows well
1 acre	Heritage wheat; spelt; emmer; milling barley; oats; wild rice
Undetermined	Various crops

The 16 producers who expressed an interest in growing grains were asked to list the issues or obstacles that needed to be overcome before they could begin any grain cultivation. Most of the producers indicated that they had little if any grain growing experience so would need to develop their knowledge in this area. Several said they will need machinery along with other concerns, as follows:

- Fencing
- Equipment/machinery
- Irrigation
- Knowledge
- Marketing
- Drainage
- Secure land tenure to allow for the investment in fencing, drainage, ponds & equipment

Storage Facilities

A major objective of this study was to determine the need for storage facilities. The survey asked producers several questions about the adequacy of their current storage facilities and their projected needs if they increased production.

Highlights

- Fifty-five percent of respondents said they have enough storage, including cold storage facilities on their farms.
- The remaining 45% of respondents said they need some more storage for root vegetables, apples, garlic, assorted fruits & berries. One respondent identified needing more temperature controlled storage for value-added product if production increased.
- The results of the survey are inconclusive regarding the volume of storage that is needed and whether the storage should be on-farm or in a central facility.

Coordination

Producers were asked if they had an interest in exploring the possibility of coordinating activities with other commercial producers. They were offered a list of nine different functions including activities related to production as well as distribution and marketing of produce.

Table 12 Producers’ areas of interest in coordination (N= 41)

	Yes	No	Don't know
Coordination of promotion of local produce	71% (29)	20% (8)	9% (4)
Coordination of marketing	66% (27)	24% (10)	9% (4)
Coordination/shared storage	51% (21)	37% (15)	12% (5)
Coordination./shared transport	49% (20)	42% (17)	9% (4)
Equipment sharing*	44% (18)	44% (18)	12% (5)
Coordination of wholesale distribution	44% (18)	44% (18)	12% (5)
Shared inputs**	34% (14)	56% (23)	9% (4)
Coordination of crop planning	32% (13)	59% (24)	9% (4)
Shared land use	24% (10)	61% (25)	15% (6)

*included expressed interest in juicing equipment; licensed kitchen ;** included expressed interest in shared labour

Highlights

- 92% of respondents said they are interested in coordination in at least one area; 77% indicated an interest in at least three areas and two-thirds (67%) (26) indicated an interest in coordination in four or more areas.
- **Table 12** shows that the strongest interest in coordination related to promotion of local produce and marketing with somewhat more than two-thirds of producers favouring these two areas. In addition, about one-half of the producers indicated an interest in exploring possibilities of coordinating storage and transportation.

- Significantly fewer producers expressed an interest in coordination in the areas of shared crop planning and shared land use. It is still the case, however, that 30% and 21% of producers are interested in these two areas respectively.

Table 13 Producers’ contributions to coordination (N = 39)

	Yes	No	Maybe	No response
Would you be willing to contribute to the costs of coordination?	20 (51%)	8 (21%)	9 (23%)	2 (5%)
Would you be willing to contribute equipment and/or facilities?	10 (26%)	22 (56%)	5 (13%)	2 (5%)

Producers were asked what kind of organisational structure they thought would be most appropriate if an organisation was established to provide coordination services. In general this was a difficult question for producers given that they were being asked to consider options without any details.

Highlights

- 18% said they couldn’t make a choice about organizational structure at this point.
- Among the other respondents, many indicated they would consider two or more of the organisational options presented.
- The mostly frequently selected organisational preference was a co-operative with 41% of producers selecting this option.
- The second most frequently rated option was informal arrangements followed closely by a not-for-profit corporation.
- A for-profit corporation and partnerships among existing organisations were selected by less than 20% of respondents.

Table 14 Producers organisational preferences for coordination

Options	Frequency Chosen
For-profit corporation	7
Not-for-profit corporation	10
Partnerships/Collaborative	5
Co-operative	16
Informal arrangements	13
Don’t know	7

SECTION 2 TUESDAY FARMERS MARKET SURVEY RESULTS

As part of the study, a test project was developed aimed at increasing the viability of the Tuesday Farmers Market. Several objectives were set:

- To increase the number of vendors and maintain their attendance
- To increase public awareness of the market
- To establish a consistent marketing message.
- To increase the number of regular shoppers
- To strengthen the relationship between commercial growers and local residents
- To create a dependable market
- To encourage vendor-shopper ownership of the market

Highlights

- The market started Tuesday, July 19 and was held each Tuesday through to October 4, 2005 in the United Church meadow in the centre of Ganges but situated off the main thoroughfare. (Use of Centennial Park is not currently permitted for the Tuesday Market.)
- The time of the market was changed to 2:00 to 6:00 pm from 10:00 to 1:00 pm last year.
- A vigorous advertising campaign was launched including strategically placed sandwich boards to draw people onto the side street, a series of newspaper ads, and small signs in local businesses.
- Potential vendors were canvassed. The number of vendors each week for the first six weeks was on average 14. This included a combination of between 5 and 9 growers and 6 or 7 value-added producers each week.
- The number of vendors started dropping off in September until the last market date in October which attracted only 3 vendors. This decline corresponded with a drop in the number of customers each week.
- Most of the shoppers attended earlier in the afternoon rather than later. A survey of vendors indicated that highest rate of shopping was between 2:00 and 3:00 pm and the rate dropped off significantly after 4:00. As a result, vendors starting packing up anytime after 5:00 so that by 6:00 there were usually only a couple of vendors left.

A survey was conducted of a sample of shoppers at the Tuesday Farmers Market on two different occasions.

Table 15 Residency of shoppers at the Tuesday Farmers Market

Sex	Residents		Non-resident	Total
	Full-time	Part-time		
Males	14	4	8	26 (35%)
Females	28	4	14	46 (64%)
	42	8	22	72
	58%	11%	31%	100%

Table 16 Shopping patterns of Tuesday Farmers Market shoppers

	Average amount spent per shopper	Average # of vendors per shopper	Average Amount spent per vendor
Males	\$13.70	2.2	\$6.23
Females	\$15.90	2.6	\$6.12
All average	\$14.80	2.4	\$6.17

Table 17 Shoppers satisfaction with the Tuesday Farmers Market

	Very good	Good	Just okay	Not good	Don't know
Quality of products today	67 (93%)	3 (4%)	2 (3%)		1
Friendliness of the market	66 (92%)	5 (7%)			1
Location of the market	52 (72%)	14 (19%)	3 (4%)	1 (1%)	
Overall experience of shopping	58 (81%)	11 (15%)	3 (4%)		

Highlights

- The majority of shoppers were female and a significant minority of the shoppers were either visitors to the island or part-time residents (Table 15)
- Shoppers shopped at an average of 2.4 vendors and spent an average of \$6.29 at each.
- A large majority of the shoppers were very satisfied with the quality of the products at the market and the overall market experience.

SECTION 3 GENERAL PUBLIC SURVEY RESULTS

Because of limited resources it was not possible to conduct a survey based on a fully representative sample of the Salt Spring population. Thus these results should not be generalized. They do provide, however, a good *indication* of the attitudes that people living on Salt Spring Island have towards local food.

This survey was conducted with 73 people in September in Ganges at three locations: the Ganges Village Market parking lot; Thrifty Foods parking lot; and the street in front of Salt Spring Natureworks. The survey asked a range of questions about people’s shopping patterns as they relate to local food and their opinions about the local food system on Salt Spring. All the respondents were residents of Salt Spring.

Table 18 Frequency and volume of local food purchases

	Males	Females	Total
Weekly purchases of local produce	27% (20)	41% (30)	68%
Once or twice per month	8% (6)	15% (11)	23%
Less than once per month	3% (2)	4% (3)	7%
<hr/>			
< 10% of all produce purchased	11% (8)	23% (17)	34%
About 25%	6% (4)	16% (12)	22%
About 50%	7% (5)	11% (8)	18%
> 50%	11% (8)	12% (9)	23%

All of the respondents who said they purchase at least some local produce, indicated that they purchase it at several different venues. **Table 19** shows that the mostly frequently identified venue was Thrifty Foods and the second was farm stands.

Table 19 Frequency of locations where shoppers buy local produce

Thrifty Foods	Farm Stand	Ganges Village Market	Natureworks	Saturday Market	Tuesday Market	Other
66%	45	40	27%	23%	21%	3%

Most respondents who purchase local food were of the opinion that local produce is very good quality and, generally speaking, is good value for the money. Many of those surveyed, however, strongly stated that local produce is expensive or too expensive.

Table 20 Opinions about the quality of local produce

Very good	Good	Satisfactory	Not good	Don't know
71%	22%	3%	0	5%

Table 21 Opinions about the value of local produce for the money

Good value for the money	Good value but not affordable	Too much money for the value	Don't know
51%	27%	15%	8%

The majority of respondents said they see local produce in grocery stores only once in a while or not at all. Some noted that local produce isn't labeled. When asked if they look for local produce in restaurants, 53% said they do and 46% said they don't.

Table 22 Frequency that respondents see local produce in grocery stores

Always see it	See it only once in a while	Never see it	Don't know
41%	39%	18%	3%

Highlights

- 90% of those surveyed indicated that they have purchased at least some local food in the past five or six months.
- While most of those surveyed said they do purchase local food on a weekly basis, most said that local produce comprises less than 10% of all the produce they have purchased in this time period.
- 68% of respondents said it is very important to them that local produce be organically grown; 18% said it is somewhat important; and 12% said it is not important.
- 74% of survey respondents said it is very important that by buying local produce we reduce the amount of fuel that is used to transport produce to the island; 12% said it's somewhat important; and 9% said it's not important.
- 80% of respondents said it is very important that we grow more of the produce we eat on Salt Spring and 14% said it is somewhat important.
- 68% of respondents said they would buy a lot more local produce if it was available in grocery stores; 23% said they would buy somewhat more; and only 9% said they wouldn't buy more at all.

PART 5 RECOMMENDED ACTIONS

A major objective of the study was to develop an action plan that would have immediate impact as well as taking a longer look at the viability and sustainability of produce production on Salt Spring Island.

Based on a synthesis of the study findings, there are five key factors that form the framework for this action plan:

- ❖ there is insufficient commercial produce being grown on Salt Spring Island to meet anything more than a small proportion of the current needs of grocers, restaurants, individuals and families;
- ❖ there is a critical mass of experienced farmers who are interested in increasing commercial produce production;
- ❖ the insufficient production combined with community interest in local agriculture and food self-sufficiency present a significant opportunity for farmers;
- ❖ there is sufficient farmland to increase produce production;
- ❖ there are several operational, management and coordination obstacles that need to be addressed if produce production is going to be significantly expanded; and
- ❖ Island Natural Growers has a mandate to provide ongoing support for agricultural development on the island and a strong interest to work within its capacity to facilitate coordinated actions with farmers and interested groups in the interests of agricultural sustainability on Salt Spring Island.

IMMEDIATE AND SHORT-TERM ACTIONS (December 2005 to June 2007)

1. Communicate the results of the study to the community-at-large.
2. Present the results of the study to selected Salt Spring Island groups who share an interest in food security and agriculture sustainability in order to discuss and plan opportunities for complementary actions, e.g. the Islands Farmers Institute; the Islands Trust; the Capital Regional District; Salt Springers for Safe Food; the Energy Strategy group; the Salt Spring Island Conservancy.
3. Participate in the Farm Area Plan initiative with the Island Farmers Institute, providing information from the study and developing policies and practices that support local food production.

4. Organise a meeting of commercial producers who indicated in the study that they are interested in increasing production. This is a group of about 26 farmers. One of the main purposes of the meeting will be to discuss the feasibility of increasing commercial production on Salt Spring Island by 15% each year for the next five years. This would bring production to 276,600 lbs in the first year; 318,100 in the second year and so on.

Other topics that would be discussed at the meeting are:

- organizing some form of equipment and tool sharing.
 - coordinating pick-up and transportation for wholesale distribution.
 - creating a shared-facility for value-added production: e.g. 1) a central washing and packaging facility for greens—for distribution to restaurants, grocers, caterers; 2) a central apple juicing facility.
 - increasing certified organic production as a value-added feature.
 - coordinating information about current/week-by-week crop availability in order to make it easier for food service buyers to source upcoming harvests.
 - organising a residential box delivery service.
 - innovative ideas for on-farm storage.
 - potential need for centralized shared storage.
5. Investigate the potential for changing the location of the Tuesday Farmers Market to Centennial Park, where it will be more central and more visible.
 6. Organise a series of workshops for produce farmers, in consultation with the Farmers Institute. Suggested topics:
 - Hands-on training in the use of labour-saving devices and techniques.
 - Farm business planning and financial management training; assessing economic feasibility of various types of decisions focusing on expansion and diversification.
 - Wholesaling your produce: making changes in order to sell to grocers and restaurants; produce preparation, packaging/boxing; pricing; predicting demand; invoicing.
 - Expanding direct on-farm marketing.
 - Winter growing at a commercial level.
 7. Research the availability of machines and tools that would improve work efficiency on commercial produce farms and are appropriate to the scale of farming on Salt Spring.
 8. Organise a meeting of the relevant producers to share the grain production data and to facilitate planning the actions they would like to take.
 9. Facilitate a meeting(s) with interested producers, grocers and restaurateurs to explore options for test marketing projects in the spring-summer-fall of 2006.

10. Apply for funding to assist in coordinating the implementation of this action plan and to cover the costs of those items that have organizational expenses associated with them.

LONGER-TERM ACTIONS (June 2006 forward)

11. Facilitate as appropriate in assisting appropriate actions agreed to at the producers planning meeting (#4 above).
12. Monitor land-use for commercial produce production, documenting changes in the amount of land in production year-over-year 2005 to 2010.
13. Monitor commercial produce production, documenting changes in the amount of produce grown year-over-year from 2005 to 2010.
14. Monitor progress on the Murakami agri-industrial development and assess opportunities.
15. Continue work on the Farm Area Plan and any action and monitoring that flows out of the planning process.
16. Monitor the need to facilitate the organization of a farmer-controlled coordinated system for marketing their produce.
17. Continue working with the organizations identified in #2 to implement coordinated plans that promote and increase food self-sufficiency on Salt Spring Island.

PART 6 CONCLUSION

This study began with a clear emphasis on assessing and addressing the marketing, distribution and storage needs of commercial produce producers on Salt Spring Island. As the data collection got underway and information from producers began accumulating, a picture of the low volume of commercial produce that is actually being grown on the island began to form. More of the details about volumes were filled in with information from the retail grocers. Once the data collection was complete the analysis showed:

Commercial produce acreage is only about 1% of the active farmland on Salt Spring and the volume of produce, while varied and of high quality, is sufficient to supply less than 7% of the island population.

The study found that producers are, for the most part, selling all of their crops. And, at this volume at least, most prefer to sell retail rather wholesaling. At the same time, retail grocers and some restaurants reported that they are not able to source an adequate supply of quality Salt Spring-grown produce to meet their requirements. These findings turned the marketing question on its head. The issue shifted from how to market and store the produce to how to get enough produce to meet demand.

At the point when the picture of low volumes emerged, more emphasis was placed on identifying obstacles associated with increasing production and expanding the availability of local produce to the public. Many different factors come into play from increasing the efficiency of farm work to appropriate mechanization to competitive pricing to engaging the community in supporting their own food security with their food dollars.

This study is completed but the larger project of supporting and promoting produce agriculture on Salt Spring Island is far from over. The report recommends actions that will help to move this objective forward. Island Natural Growers has received co-operation from all groups and individuals that it has contacted through the course of this study. A real test is going to come, however, in implementing the action plan that has evolved from the study findings. ING is committed to sharing the findings throughout the community and with other communities. It is also committed to organizing workshops, facilitating meetings and promoting agriculture in ways that support individual farmers as well as the sector as a whole. These things are all within the stated mandate of Island Natural Growers.

Will these efforts increase production? Will they be successful in ensuring a reliable, high quality supply of produce on Salt Spring—a supply that replaces a significant proportion of the produce that is currently being transported onto the island from other parts of BC, Canada, the world?

The original research conducted in the course of this study provides the baseline data that is needed to measure changes in produce production and assess two and five years from now whether we are doing a better job of feeding ourselves than we are now.