

Fireweed Food Community Service Co-operative: CAP 1 Final Project Report (1000217421)

PROJECT TITLE: Food Hub Pilot Project

EXECUTIVE SUMMARY

In October 2019, Fireweed Food Co-op (FFC) received grant funding from the Canadian Agricultural Partnership (CAP) Grant to develop and launch a pilot-scale aggregation, distribution and research centre for regionally-sourced food products in Winnipeg. This project intended to use an applied research method to evaluate the impact of this operation on regional agriculture, agri-food and agri-product markets and assess the long-term feasibility of this model. In summer 2020, Fireweed Food Hub (FFH) officially launched.

This report will review the Food Hub's first year of operation, including the planning phase from January 2020 to June 2021. As our findings demonstrate, the Food Hub can play a critical role in the growth and vitality of the local food economy, however, there are some existing barriers that FFC must address in order to realize our long-term goals.

BACKGROUND & OBJECTIVES

Before Fireweed Food Hub, there were few places for small- to medium-scale farmers and agri-food processors to sell and distribute their goods beyond in Manitoba. Direct marketing was one of the only sales channels for small producers but required an immense amount of time, resources and skills and thus, was not always sustainable in the long-term.

As the demand and awareness for local, organic and sustainable food grows (even more so during the COVID-19 global pandemic), there is also increased pressure for foodservice to provide these products to their customers. However, in Manitoba, this currently means working with multiple individual producers, which— though many appreciate the relationship— can be a deterrent due to the time involved.

With support from industry partners, FFC has been working to fill this gap by providing year-round aggregation, marketing and distribution of regionally-sourced food products on behalf of small to medium scale farmer, fisher, and rancher producer co-op members to restaurants, retailers and institutions via a Food Hub in Winnipeg.

The objectives of this granted project were threefold:

1. To increase the accessibility of regionally-sourced food to commercial buyers and monitor the economic impact on Manitoba's agriculture and agri-food sectors (% change in seasonal revenue of producers as a result of participation, revenue generated, etc.;

2. To explore and determine the feasibility of transferring some of the responsibility for direct marketing away from small- to medium-scale regional farmers and agri-food processors onto a third party broker (in this case, Fireweed Food Co-op);
3. To determine the feasibility of using an aggregation strategy to meet the demands of commercial buyers for large volumes of regionally sourced products from multiple, small- to medium-scale producers.

METHODOLOGY & PROJECT ACTIVITIES

FFC used an applied research approach to generate first-hand observations on how to solve two critical problems: difficulty accessing or limited access to local food by commercial buyers and difficulty accessing or limited access to reliable markets by small and medium-sized producers.

The key activities were vast and are described below:

1. **Research and Planning:** We researched and determined an appropriate business model (consignment brokered sales) for the Food Hub; rebranded the organization for clarity of goals and projects; wrote grants and fundraised to cover capital purchases and other critical expenses such as additional wages; secured a central warehouse space and made appropriate renovations; researched food safety and agricultural-related regulations and applied for permits and insurance; secured the rental of a cargo van for delivery from Peg City Car Co-op; determined the logistics, policies and procedures for our operations (which continued to be refined throughout the year); met with a software developer to explore multi-vendor marketplace software options; set up and received training on our current ordering system, Local Food Marketplace.
2. **Purchasing and Installing Equipment:** We purchased chest freezers (second hand), materials to construct a walk-in fridge, a three compartment sink (second hand); food grade shelving (Muscle Rack 4-Tier Steel Shelf, Model #: UR364P-BLK, a digital scale for weighing products (Smart Weigh 50kg, Model #: ACE110) and digital temperature monitors (Mocreo Wireless Thermo-Hygrometer with Hub, Model #: VSN1-T).
3. **Hiring and Training Personnel:** With the support of CAP and other financial sources, FFH hired a Food Hub Coordinator (Full Time, \$20/hour plus MERCS, May 2020-September 2021), Projects Coordinator (Full Time, \$20/hour plus MERCS, October 2019-June 2021), Delivery Coordinator (at 20 hours/week, at \$15/hour plus MERCS July-November 2020 and March-September 2021) and Food Hub Assistant (at 20 hours/week, at \$15/hour plus MERCS July-September 2020). In 2021 we realized the need for a full-time Supplier Coordinator and Finance and Office Coordinator, whose wages are currently being covered by other funding sources until September 30, 2021. In total, **six jobs were created** through this project including two full-time year-around jobs, two part-time seasonal jobs as well as two full-time seasonal jobs.

4. **Outreach & Relationship Building with Stakeholders:** We had preliminary meetings with existing and prospective partners including Harvest Moon Local Food Initiative, Direct Farm Manitoba (DFM), and Diversity Foods; hosted a producer engagement session at the DFM conference to consult on farmer delivery schedule, packing and labelling requirements, price setting arrangement, and marketing; actively recruited suppliers with cold calls, emails, outreach through DFM, virtual info sessions followed by one-on-one phone calls with interested producers; as well as organized and hosted the Lateral Root Network (a food hub advisory committee made up of producers, commercial buyers and food security organizations).
5. **Sales & Marketing:** We developed a marketing strategy tailored to target customers which was refined throughout the year, particularly as a result of COVID-19; partnered with DFM to supply food for the Manitoba Community Food Currency Program which created a steady source of sales for our first summer; created a product catalogue and seasonality calendar to encourage customers to plan their menus with Food Hub products in mind; worked with Tetro Design to create a unique brand identity for the Food Hub; created social media and blog content to educate customers and the public about the local food system; coordinated a weekly cooperatively supported agriculture program (CSA) targeting individual households to ensure continued sales for producer members during the COVID-19 pandemic while restaurants were shut down; researched and populated a CRM system through HubSpot to create automations and track client communications; sent surveys and scheduled in depth calls with customers to gauge interest on specific products and generate feedback on Food Hub pricing, online ordering system and other services; hired a photo intern to photograph our product catalogue and create visual content for marketing purposes; and worked with business consultants funded through the Investment Readiness Program to evaluate and pivot various sales and marketing strategies.
6. **Coordinating Suppliers:** We created a Supplier Manual to help producers navigate the wholesale market and have success selling through the Food Hub; created an internal communication strategy for working with producers; hosted informational sessions and created tutorial videos to help producers digest important information; developed a food safety and quality standards; sent surveys to gather feedback on food hub logistics and services; scheduled in depth phone calls with producers to discuss feedback; facilitated collective crop planning activities and encouraged specialization producers to ensure a steady supply of product for summer 2021; coordinated shared delivery among producers; created automations for supplier onboarding through our customer relationship management software, Hubspot.
7. **Ongoing Market Research:** We are undertaking research on pricing to help producers determine competitive prices for their products; consulting with other Food Hubs about

their operations and strategies for success; partnering with a university research team to evaluate the productive capacity of small farms to meet institutional demand via a school lunch program; created customer surveys; and are conducting secondary market research with help from the board and Food Hub committee.

RESULTS & DISCUSSION

Over this past year, FFC has gained critical insights into the strengths and weaknesses of this Food Hub project. These insights, we believe, are only possible because of the applied research approach of this project and the detailed, in-depth experiential learning it afforded our organization. We have begun to track the impacts of this project, though it is difficult to measure the full efficacy of the Food Hub as this data can take several years to gather. According to a report on evaluating community food hubs, “it can take between seven to ten years for a Food Hub to really begin to demonstrate the achievement of outcomes” (Nelson and Landman, 2015 p. 7). Nonetheless, below are our key findings from this project as they related to our original objectives:

1. Increasing the accessibility of local food to commercial buyers

Going into this project, we thought the most significant hurdle we would encounter would be around sales, but much to our surprise, we have found working with customers to be smoother than expected.

Based on informal conversations, most of our customers have found our online ordering system easy to use, and our product photos and descriptions accurate and appealing. They also appreciate our quick and on-time delivery, payment processing, and customer service, all of which have helped increase their commitment to purchasing locally. Although it was challenging to get customers to participate in formal feedback surveys, our high customer retention rate is a testament to their satisfaction with our services. Among the 36 commercial buyers we sold to, 26 were repeat customers (ordered more than two times) and eight were loyal customers (ordered more than ten times).

Finally, all customers have expressed their strong appreciation for the core service of making local, high-quality, and in-season products far more accessible and available to them.

Community organizations, which account for 55% of our sales, have been among the easiest customer segments to work with thus far. They are flexible, receptive to feedback on purchasing, and their order sizes match up more closely with our current supply, although our prices are sometimes an issue as they are often working with small budgets, which is why we receive a lower profit margin on their purchases. As a workaround, we partnered with Direct Farm Manitoba to supply the Manitoba Community Food Currency Program, which aims to support small farmers and tackle food insecurity by purchasing local food for communities in

need. Some of the other community organizations we've supplied to include Norwest Co-op Community Food Centre, Churchill Health Centre, Tunngasugit Inuit Resource Centre, and the Northern Association of Community Councils.

Restaurants, particularly upscale establishments, are another vital customer type and made up 30% of our sales last year, although we anticipate restaurants to play a larger role in our total sales this coming season as their operations over the last year were significantly impacted by COVID-19. According to Stats Canada, "a decline in revenue of 40% or more in 2020 was a reality for over two-fifths (42.9%) of food services and drinking places, with those in Quebec (50.9%), Manitoba (47.9%) and Ontario (44.9%) most likely to see this level of loss." Despite these challenges, we found that similarly to community organizations, restaurants are also flexible, match up with our current supply, and are most willing to pay more for high-quality local food. Many also appreciate the added bonus of promoting themselves as supporters of the small producers. Some of our loyal restaurant customers include Harth Mozza & Wine Bar, The Beer Cantina, The Roost and Sous Soul. We are grateful for the loyal support of these restaurants even through the COVID-19 pandemic, which speaks to their dedication to local food purchasing.

Retailers, on the other hand, were more challenging to work with, presumably because the Food Hub's prices were too high for them to then add their mark up onto. Nonetheless, we did manage to sell to Organic Planet Co-op regularly and Food Fare more than a handful of times. We've also had several positive conversations with small grocers that have yet to translate into sales, but we hope this will change after more intentional time spent crop planning with farmers, and during the seasons when we have more fresh products available.

Institutions, as expected, were the hardest market to enter. Due to our limited supply and higher prices, it was challenging to get any serious interest from institutions in our development stage. As a matter of fact, a report by Food Matters Manitoba in 2016 also found that quantity and consistency and price were among the most significant barriers to institutional procurement of local sustainable food (Manitoba on the Menu, 2017). We also came to realize that selling to institutions would require them to have a greater understanding of the economic benefits to local purchasing, stronger knowledge of the local food system, and a specialized marketing approach, none of which we were able to support in our first year of operations. That being said, FFH was recently added as an approved supplier to the Winnipeg Regional Health Authority, which we hope will open some doors to institutional procurement in the near future.

As for other challenges, **the lack of consistent and ample supply was a major issue** for all buyers. When the Food Hub first opened in 2020, we had to take what we could get from producers, which meant selling a little bit of this and that, translating to customers only placing small orders for their menu specials. However, when the winter rolled around, we worked closely with our producers to ensure they would grow a consistent supply of vegetables. Despite these efforts, producers were hesitant to produce any significant volume without confirmation that

customers would, in fact, order their products, while customers weren't willing to incorporate products in their menus if they didn't have access to a reliable supply.

This finding aligns with Food Hub studies which indicate that reliable quantities are essential for customers but difficult for food hubs to fulfill in their early years (Food Matters Manitoba, 2014; Barham et al., 2012; Cleveland, Müller, Tranovich, Mazaroli, & Hinson, 2014). All that is to say, collecting reliable data on supply and demand will be key for the success of the Food Hub, but realistically, it will take a few years to gather.

Finally, it goes without saying that **the biggest challenge we faced on the customer front was the pandemic**. According to Stats Canada, restaurants and the foodservice industry have been the hardest hit by the COVID-19 public safety measures, making it very difficult to navigate as a newly established wholesale distributor of local food. There have been countless occasions when we invested a lot of time building customer relationships only to have them stop ordering for months when a new round of restrictions were implemented. Even when some restrictions are lifted, restaurants and foodservice are, rightfully so, more price-conscious and risk-averse, making purchasing from the Food Hub a harder sell. To continue to make sales for our producers during the lockdowns, we had to pivot our operations to focus on individual household sales, which, although successful, has taken away from our efforts to build up our wholesale customer base. Nonetheless, the pandemic has also underscored the importance of strengthening our local food system, which we are beginning to see materialize into sales as restrictions are lifted

2. Creating a viable alternative sales channel for small producers

Since this project began, the Food Hub has worked with 33 producers, comprising small-scale farmers, fishers, ranchers and artisans from across the province, as well as one Nunavut-based Indigenous fishers co-operative. This is three times the number of producers we expected to work within our first year. Only two who sold through us last year chose not to carry with us into our second season.

Excluding the Food Hub's commission fee, sales revenue that has gone directly to our producer members totals **over \$70,000** to date. Further, Food Hub sales for 2021 have already surpassed 2020 sales, and comparative to another similarly sized food hub in Canada which saw \$45,000 in sales during their first (non-pandemic) year of operation, Fireweed Food Hub sales demonstrate significant success.

Although it is difficult to track the exact increase in revenue for producers, 67% of the producers surveyed reported that participating in the Food Hub increased their total overall sales, while the other 33% were unsure but agreed that selling outside the Food Hub would have required much more work. As far as satisfaction with our services, 73% of producers felt that we did an excellent job of communicating important information, and 56% thought that the order sizes had

been worth delivering to the city. It is important to note that this survey was conducted during the off-season when sales were much slower. We anticipate total sales and producer satisfaction to improve significantly as COVID-19 restrictions are lifted this summer.

Based on our experience, there are certain types of producers who have been more successful than others. Perhaps unsurprisingly, producers who can list consistently high volumes, sell unique or popular products, follow good quality standards, and price their products at a reasonable rate are more likely to receive larger and repeat orders from customers. These producers tend to be a bit larger in scale and have some wholesale experience, although this is not always the case—two of our producers who fit this description made over \$14,000 each in sales. That said, we have also found small producers new to the wholesale market to be the most flexible to work with, quicker to understand our organization's goals, and committed to seeing this project succeed, which is also essential, especially at this stage in our development.

Challenges: We have also discovered that working with small producers requires more work than we initially anticipated for several reasons, many of which are symptomatic of the everyday challenges faced by small producers. For many small producers, **the distance to Winnipeg is too far** to make several trips per week or justify delivering a small order. As a result, we could only offer our customers one delivery day per week during our first year. It also meant that producers were frustrated when their orders were small, which was unfortunately common during the lockdowns and overall as a result of the COVID-19 pandemic. Increasing our storage capacity could reduce the number of trips into the city for some producers, but this would require high investment in capital assets, which we currently cannot afford. In the interim, however, we are encouraging producers to coordinate sharing delivery amongst each other.

Communication is another big challenge. Small producers are strapped for time, are used to working on their own schedule, and many are without proper cell reception and internet access. As a result, there have been many instances when our producers have failed to tell us important information about their products promptly. For example, a producer fails to notify us that they don't have enough quantity to fulfill their order until the very last second or a producer does not inform us that they won't make their delivery window. These communication errors make it difficult for us to build trust with our customers, thereby discouraging customers from placing large and repeat orders. As a temporary fix, we're spending more time sending regular email and text reminders to our producers, but the hope is that the food hub will become part of their weekly rhythm with time.

As expected, **pricing is also a huge sticking point** for small producers. Having sold through direct marketing, they are accustomed to charging high prices for their products in order for their businesses to stay afloat, even if it takes a lot more effort to make these sales. However, these prices are far too high for commercial customers, yet many producers aren't willing to lower their prices unless they sell enough volume to make it worth it. The problem is, of course, they won't move enough volume unless they reduce their prices. However, as per the request of

our producers, we are currently conducting pricing research with the support of our business consultants to help producers find the price equilibrium on their products. We hope that this data, along with building up a strong and loyal customer base, will help solve this pricing dilemma.

Finally, as already discussed, producers have found the **inconsistency of orders** to be an issue. Customers have been placing orders at random, making it difficult for producers to know how much they should grow and set aside for the Food Hub. Without guarantee their products will sell, producers treat the Food Hub as a channel to sell excess products, thereby only listing small quantities. However, this makes it challenging to reach sales levels that would make the Food Hub a viable and sustainable complement to grow and support the local food sector. In response to this problem, we created a seasonality calendar and product catalogue to encourage restaurants to plan their menus with our products in mind, but we have yet to see whether this will take off the way we intended. We also see the need to spend more time educating customers about the constraints of local food. Finally, we have built into our plans for the coming year, more time in helping producers become wholesale ready which includes conducting more thorough market research, and creating wholesale readiness resources and a workshop series.

Despite these difficulties outlined above, we have come to learn that relationship-building and providing support for producers will pay off in the long run. Several studies confirm that those food hubs with positive relationships with their producers, as well as those who provide training, are often the most successful (Cleveland, Müller, Tranovich, Mazaroli, & Hinson, 2014; Food Matters Manitoba, 2014; Diamond & Barham, 2012).

3. Using an aggregation strategy to meet the demand of large buyers

When the idea of developing a Food Hub in Manitoba was first conceived, aggregation was a crucial part of that vision. The assumption was that small producers would not be able to meet the demand of the wholesale market without aggregating their goods in some way. Although this is still the case, once the Food Hub was up and running, we quickly realized that there were two different types of aggregation, one much easier to implement than the other.

The first of these types involves aggregating products from multiple producers via an online sales platform and marketing all individual products separately. This approach has proved to be successful as it has allowed customers to place and receive orders from multiple producers at once. The second type of aggregation, i.e. marketing and aggregating the identical product from numerous producers, however, was not something we could not immediately or easily implement at this stage in our development for several reasons.

As previously discussed, our producers are not at a place to grow **consistent quality** products that could easily be aggregated, at least not to the standard that large customers would require.

For this, we would likely need to help our producers receive GAP certification, which is something that other Food Hubs often require their producers to have.

Through surveys and feedback sessions, we have also found that small producers are **attached to their brand identity** and fear losing it if they were to aggregate their product with other producers' products. Most of our customers also rank knowing exactly where their product is coming from as very important.

Finally, **pricing is another challenge** for aggregation with our producers listing the same products at different prices. As a possible solution to this, we are doing pricing research and planning to create an acceptable price range for each product in time for next season, which producers have expressed interest in.

The truth is, in order to aggregate to meet institutional demand, **we will need greater participation from mid-sized producers** who are better positioned to offer lower prices, greater volumes, and more consistent quality. However, it has been much more difficult to find these producers as many do not have an online presence compared to small farms. Despite these challenges, we have not abandoned the second type of aggregation and will continue to explore its feasibility as other critical pieces of our operations are realized.

CONCLUSION

This pilot project has confirmed for us the need for a full-fledged Food Hub in Manitoba. On their own, small to medium-scale producers are struggling to access a stable market despite the growing demand for local food. On the other side, commercial buyers are interested in purchasing locally but don't have the time and resources to coordinate with multiple individual producers.

This is where Fireweed Food Hub comes in. By marketing, aggregating, and distributing products from multiple sustainable small producers, the Food Hub can alleviate some of their responsibilities so that they can focus on growing while also making it easier for businesses to purchase good local food. With time, this can scale up the supply and demand for sustainable local food in a significant way that is critical to addressing the climate crisis and ensuring the province is food secure as global food shortages continue.

Yes, there are some significant hurdles to operating a Food Hub in Manitoba, many of which are not new or all that surprising. Pricing, limited quantities, and long distances are some of these challenges, along with unrealistic customer expectations that small producers cannot often meet. However, research on food hubs also shows that the challenges outlined in this report are typical for the first few years of development (Food Matters Manitoba, 2014). If a Food Hub can make it past these initial growing pains, there is real potential to have a sizable impact on the agricultural sector and the economy more broadly.

FFC is incredibly adaptable and good at coming up with interim solutions, but finding stable funding, investing in customer education and knowledge, and providing more support for producers while they learn to specialize and scale up will be vital in helping us realize our long-term vision.

Some of our recommendations for this project moving forward include:

1. The Food Hub requires greater investment in capital assets in order to provide the storage and delivery capacity needed to help small producers sell to larger commercial buyers. This includes a walk-in freezer, reefer vehicle and a larger warehouse space, among other capital requirements.
2. Educating customers about the realities of small food production will need to be a key marketing strategy moving forward.
3. Working with small suppliers will require more work and support in the first couple of years of operations as we help them navigate and adapt to the wholesale market, recommended by investing in a Full Time Year Round Supplier Coordinator Position in addition to the existing Projects Coordinator and Food Hub /Sales Coordinator Positions.
4. Having a balanced assortment of medium scale farms oriented towards wholesale and small farmers will be an important strategy moving forward to ensure we are both meeting current demands as well as supporting producers to reach future demand.

FUTURE RELATED OPPORTUNITIES

- **Food Hub Assessment Project** - Although the informal feedback from various stakeholders has been useful, we realized the need for a more thorough assessment of our first year of operations in order to turn our observations, raw data, and research into a solid road map for the coming years. Thanks to the CAP Ag Action Industry Development grant, we have been undergoing a rigorous evaluation of the Food Hub which has included formally consulting with our suppliers and other Food Hubs, and conducting a more extensive survey to measure the values and benefits of our operations. These findings will be presented in our final report at the end of August 2021.
- **High Potential in Local Suppliers** - There is an abundance of good, fresh, and local food to meet the demand at a regional level and many of our suppliers who meet our key criteria are good candidates for wholesale readiness.
- **Increasing Food Hub Sales** - Fireweed Food Hub is expected to increase total sales from \$35,000 in 2020 to \$90,000 -100,000 in 2021; Fireweed Food Hub was recently added as an approved supplier to the Winnipeg Regional Health Authority's supplier list.
- **City Social Procurement Initiatives** - Winnipeg's Executive Policy Committee recently voted in favour of a new local procurement policy upon which Fireweed Food Hub will

provide feedback and input as part of a coalition of stakeholder social enterprises.

- **Research Partnerships & Data Access** - The Food Hub is acting as a community partner for researchers at the University of Manitoba on a research project exploring the feasibility of a locally-sourced school lunch program which includes an empirical study of the capacity of local small and mid-size farmers to increase production. There is a possibility for this research to turn into a pilot project which would mean steady sales for the Food Hub and our producers.
- **COVID-19 Pandemic** - Despite presenting a number of challenges, the pandemic has disrupted global supply chains causing serious food shortages, increased food prices, and increased food insecurity-- all leading to an unprecedented consumer awareness and demand for local food. Experts predict that global food shortages will continue post pandemic which the Food Hub is well positioned to respond to.

KNOWLEDGE TRANSFER

The following list briefly describes the various speaking engagements and publications where the finding from this project were discussed:

- **Regular co-op newsletters** (100+ members)
- **Conferences/ speaking engagements**
 - Direct Farm Manitoba's Annual Conference (30 in attendance)
 - *Growing a Resilient Future: Food and Farming in Manitoba* panel discussion, March 18, 2021 (60+ in attendance)
 - CCEDNet's *The Gathering* conference, December 2, 2020 (40+ in attendance)
 - *Students Sustainability Leadership Program* event, February 18, 2021 (20+ in attendance)
- **News/Media Articles**
 - "Food hub changes name, expands mission" *The Sou' Wester*. May 26 2020
 - "A delicious pairing: Food co-op connects small-scale farmers with local restaurants, grocers" *Winnipeg Free Press*. September 2, 2020
 - "Creative pivots help small-scale food producers, sellers weather pandemic." *The Cooperators*. September 28, 2020
- **University Research Projects**
 - *The Right to Food and Community Gardens in Winnipeg* report (in progress)
 - *Nourishing ourselves during a global pandemic: Building a food secure future* research report (in progress)
 - *The Feasibility and Opportunities of a Locally-sourced, Pay-what-you-can School Lunch Program in Winnipeg*, research study (in progress)
- **Awards/ Recognition**
 - CCEDNet's *Stronger Together Award*
 - Manitoba Cooperative Association's *Cooperative Achievement Award*

- Manitoba Cooperative Association's Cooperative Profile
- **Food Hub advisory committee meetings**
- **Food Hub Supplier manual**

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