

# **Growing Up Organic Marketing Options- CWB Market Research Project**

**Local Organic Crackers: A Sustainable Option for  
Establishing Better Relationships between Children and their  
Food in Manitoba**

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Chris Hrynkow, December 2008.

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# **EXECUTIVE SUMMARY**

## **Study Background**

The Growing Up Organic project was launched nationally in early 2007 with a focus on increasing the use of local organic food in Canada's social institutions, starting with childcare centres. The Organic Food Council of Manitoba, a chapter of Canadian Organic Growers (OFCM-COG), was one of four chapters that started this initiative.

The initiative focuses on educating children about the benefits of organic food. It also allows childcare centres to elect to subscribe to an organic food delivery service. There are currently close to a dozen childcare centres committed to full participation in the program in Winnipeg.

In February, 2008, following the first year of the implementation of the Growing Up Organic Project in Manitoba, OFCM-COG initiated a feasibility study to help guide the direction of the project for future years.

Through this process, the OFCM-COG research identified a need to better understand the market dynamics surrounding how childcare centres, retailers, distributors and bakers used and view organic food in the Manitoba context. Hence, they put together a research proposal that was accepted by the Canadian Wheat Board, and this project began to take shape.

## **Study Goals and Methodology**

The main goal of the study was to develop and administer a needs assessment study to determine the viability of local bakery products made with Manitoba grains. Specifically, the focus was on the market viability of a healthy, made-in-Manitoba cracker.

The study sought to identify the challenges and opportunities that exist in developing, marketing and distributing a small selection of whole wheat crackers and/or bakery products as identified in the survey, made from Manitoba organic grain products that meet survey participants' nutritional and budgetary needs.

In the process, we also sought educate food-buying institutions on the benefits of purchasing local, whole grain bakery products. One aspect of this education was the coordination of two tours of whole grain bakeries by a participating childcare centre. We also informed local television and print media of our events. The educative function of this project will be further enhanced by publicity and the distribution of the report to organic sector stakeholders—grain producers, flour processors, and whole grain bakeries, as well as to the general public.

The study was conducted through the administration of surveys to four main groups of interview participants –childcare centres, processors, food distributors and retailers, over the course of four months. I designed and administered the study, with the invaluable support of Julie Fine. Additionally, two volunteers, Melanie Mills and Hurun Cicek, provided a much appreciated 22 hours of service. Funding for the study came from the Canadian Wheat Board.

## **Key Findings**

Three key findings that emerged from the analysis of the data are presented below.

1. The vast majority of interview participants felt that healthy food was important and associated organic food as a healthier alternative to non-organic food.
2. Healthy organic crackers appear to be a good choice to break the hold that less healthy crackers generally purchased by child care centres have.
3. Children enjoy and are excited by forming more substantial relationships with their food

For a more in depth explanation of these findings, see section D.

## **Basis for the Recommendations**

One of the major objectives of this study was to develop short and long-term action plans to help connect children to their food and assess the viability of a local, organic cracker in the Manitoba context.

The study’s findings point to five main factors that form the basis for the action plan:

- 1) The vast majority of stakeholders surveyed indicated a strong level of interest in healthy food.
- 2) The vast majority of stakeholders surveyed equated organic food with healthy food and requested more information about how to access such food through the Growing Up Organic Project.
- 3) There exists a “price problem”, which prevents childcare directors from committing to the purchase of the organic food, which they recognise as a healthier option for the children under their charge.
- 4) A bulk size of healthy local crackers could be a key first step towards creatively solving the “price problem” regarding organic food in Manitoba.

5) A bulk size of healthy organic crackers represents a real option for helping to establish better relationships between Manitoba children and their food.

For a full list of the specific recommendations flowing from these five insights, see Section E.

## **Conclusion**

Children are the future. If we are to foster a more sustainable society, we must start making choices today that care for the health of our children, society and the planet. This research shows that a local organic cracker, distributed to childcare centres, has the potential to help create a more sustainable Manitoba. Right now, we have an historic opportunity to help “grow” healthy children, a healthy society and to ensure healthy communities for generations to come. By working to make a healthy local cracker part of the learning journey that Manitoba children experience in our childcare centres, we will be taking the first steps towards this much needed growth.

## **SECTION A: THE SCOPE OF THE STUDY**

This study was initiated by The Organic Food Council of Manitoba, a chapter of Canadian Organic Growers (OFCM-COG) and was funded by the Canadian Wheat Board. Specifically, this project emerges from OFCM-COG's involvement with the Growing Up Organic (GUO) project. Launched nationally in early 2007, GUO's focus was to increase the amount of local organic food in Canadian institutions, starting with childcare centres. OFCM-COG was one of four COG chapters that took on this initiative in 2007.

Following the first round of GUO implementation and its subsequent analysis in Manitoba, OFCM-COG members and employees sought to target bakery products and crackers, in particular, as a means to introduce organic food and its accompanying philosophies of health and well being to a larger audience in Manitoba. With this focus in mind, OFCM-COG sought funding to undertake an assessment study to help connect Manitoba children to their food.

### **GOAL**

The goal of this study was to establish whether the production of local, healthy, made-in-Manitoba organic crackers was a viable option that would help re-establish connections between Manitobans (children in particular) and their food.

### **OBJECTIVES**

The goal-oriented objectives of the study were as follows:

- 1) Develop a market research report to assess the potential for value-added products, specifically whole grain crackers/bakery products.
- 2) Increase the number of institutions and childcare centres serving local organic products/crackers.
- 3) Host two tours of children and staff from childcare centres of whole grain bakeries for educational purposes.
- 4) Assess the potential to enhance the menus of food buying institutions, starting with childcare centres, other institutions and retailers, to include organic whole grain crackers made-in-Manitoba.
- 5) Increase the Growing Up Organic Project marketing effectiveness by better meeting participant institutions menu needs for crackers.

- 6) Increase ability of farms to include on-farm preparations for local milling of grains into flour.
- 7) Increase the farm participants' abilities to market their grain locally.
- 8) Increase public knowledge of the benefits of eating and producing local organic cereals.
- 9) Increase certified organic grain acres and producers in Manitoba.

## **SECTION B: HOW THE STUDY WAS CONDUCTED**

### **FUNDING**

The study was funded by grant from the Canadian Wheat Board. In addition, the interview portion of the study was supported by 22 hours of volunteer labour.

### **STUDY SUPPORTS**

The study was administered and written by a contract worker, Chris Hrynkow, who is a graduate student at the University of Manitoba. The Growing Up Organic Project director, Julie Fine, provided invaluable advice and guidance. Also, two volunteers, Melanie Mills, a former employee of Statistics Canada and Harun Cicek, a graduate student at U of M, volunteered their time to conduct interviews. The study benefited from data and a contact list compiled as part of a previous OFCM-COG project. Also helpful was the wealth of knowledge that was shared outside of the formal interview process by members of the organic food community in Manitoba.

### **TIME FRAME**

The study's interview instruments were drafted, interviews were undertaken and the report was completed in the period between July 2008 and December 2008.

### **THE STUDY'S METHODOLOGY**

The study's data was collected through structured interviews. Four main groups were asked to participate in these interviews – day care centres, retailers, distributors and bakeries. The interviews sought to determine the viability of a local, healthy, made-in-Manitoba cracker. In general terms, the study also was structured to gain insights into the current state of the interaction between Manitobans and their food.

#### **The Childcare Centre Survey**

The instrument (an interview script) for this survey was used as a guide for conducting interviews with childcare centre directors in Manitoba. The childcare centres selected for this task were all licensed centres, publicized on the Manitoba Governments' website. We spoke with representatives from thirty five childcare centres. The topics covered in this survey included: number of children at the centre; the frequency and types of food served; food budget; choice and location of food suppliers; and preferences in regards to a possible made-in-Manitoba, healthy organic cracker. The interview took an average of

about twenty minutes to complete, with about two thirds of the interviews being conducted in person and the rest by telephone.

### **The Retailer Survey**

The instrument (an interview script) for this survey was used to interview managers at Manitoba food retailers. A number of retailers were contacted who were known to sell organic and health food products in Manitoba. In the case of stores with more than one operation, managers at specific retail locations were chosen. This survey dealt very specifically with the viability of made-in-Manitoba organic crackers, covering topics including: current crackers sales, the importance of price and packaging; and storage and distribution capacities. The focus questions were very similar to those in the distributor and baker surveys, but were differentiated for the retail context. This survey took under ten minutes to complete. The interviews for these surveys were conducted by telephone and we had seven interview participants.

### **The Distributor Survey**

The idea with this survey was to contact Manitoba food distributors, particularly those involved with the distribution of food to childcare centres and other social institutions. A good number were contacted; however, only one distributor indicated a willingness to participate in the interview. This survey dealt very specifically with the viability of a made-in-Manitoba organic cracker, covering topics including: current crackers sales, the importance of price and packaging; and storage and distribution capacities. The focus questions were very similar to those in the retailer and baker surveys but were differentiated in order to reflect the distribution context. The distributor survey took about ten minutes to complete and was conducted in person.

### **The Bakery Survey**

This survey sought to interview managers of local bakeries in Winnipeg. This survey dealt very specifically with the viability of a made-in-Manitoba organic cracker, covering topics including: current cracker sales, the importance of price and packaging; and storage and production capacities. The focus questions were very similar to those in the retailer and distributor surveys but were differentiated in order to reflect the bakers' context. The bakery survey took about ten minutes to complete. We had six full participants and all but one of the surveys was conducted in person, with the remaining interview being conducted over the phone.

## **SECTION C DATA REPORTS**

### **PART 1: CHILDCARE CENTRE SURVEY RESULTS**

#### **Background to the Childcare Centre Survey**

More and more Manitoba families are turning to childcare centres in order to ease some of the pressure that work and contemporary life place upon them. This can be a great opportunity for children to develop social and education oriented skills. Part of the hope underlying the Growing Up Organic Project is that these places of early socialization might also be locations where children come to learn about how to foster healthy relationships and connections to their food. Part of the services provided by most childcare centres we surveyed include snacks and sometimes lunches. Thus, children at these centres are not only learning about educational subject matter and how to interact with their peers and caregivers, but are also taking home practical lessons about nutrition and forming (potentially) beneficial images of food each day.

The Manitoba Government regulates and partially funds childcare in the province. The government offers the only price guaranteed childcare in the country outside of Quebec, meaning these provinces limit the fees that childcare centres can charge. Recently, the Government reaffirmed its commitment to childcare as part of its policy to keep Manitoba competitive in the global economy. Specifically, at the time of drafting, the Government launched a five year action plan called *Family Choices*. This policy document commits the Government to ensuring that an additional 6,500 funded childcare spaces are available by the year 2013. In short, childcare is something of a growth industry in the province and if trends continue, it is likely that many of those 6,500 spaces will represent children who learn, socialize and snack based on a centre's programming.

In terms of our study, it is estimated that the surveys conducted represent data on 2.5% of the licensed childcare centres in Manitoba. We spoke to the managers at these centres. In total, we contacted about 5% of the centres in the province, with about half electing to respond. Childcare managers were most likely to respond when visited in person and were least likely to respond when asked to do so over the telephone. Except for nine centres, which are already part of the Growing Up Organic Project, the respondents were selected randomly. We interviewed ten respondents who are managing centres in rural Manitoba. The rest of the childcare centres' directors were working in the City of Winnipeg. We spoke to childcare centres serving between twelve and 150 children at any given time. The age range of the children at the centres we surveyed, was from ten months to twelve years.

## Food Service

The centres' representatives were asked if they provided lunch or snacks. They were also asked about the number of snacks they served each day. We do not have responses for this series of questions from six of the nine centres that were already part of the Growing Up Organic Project, bringing the number of respondents for these questions down to 29. See table one for information on food services provided.

**Table One: Some Data Related to Food Services in Surveyed Childcare Centres**

Number of Respondents for this section	Number who provide snacks	Number who provide two snacks a day	Number who provide lunch on daily basis
29	27	26	7

### Selected Highlights from the Interview Process in Regard to Food Services

- ▶ It is important to note in relation to the data in table one, that at all centres, children both snacked and ate lunches. It was simply the case that there were two centres that did not provide food. However, in both cases, the directors did mention that the staff helped younger children eat.
- ▶ The vast majority of centres (93.1%) served snacks.
- ▶ The vast majority of centres (89.7%) that did serve snacks served at least two snacks a day.
- ▶ The norm in the centres appears to be that children bring their own lunch; only 24.1% of the centres served lunch on a daily basis.
- ▶ The two centres that did not provide snacks or meals both mentioned allergies as the reason for avoiding food service.

## Kitchen and Storage Space

The centres' directors were asked if they had a kitchen or food preparation space. They were also asked about the amount of storage space in the facility. We do not have responses for this series of questions from six of the nine centres, which were already part of the Growing Up Organic Project, bringing the number of respondents for these questions down to 29. See table two for information on kitchen and storage space.

**Table Two: Some Data Related to Kitchen and Storage Space in Surveyed Childcare Centres**

Number of respondents for this section	Number who had a kitchen of food preparation area	Number who had decent storage space
29	28	26

**Selected Highlights from the Interview Process in Regards to Kitchen and Storage Space**

- ▶ The vast majority of centres (96.6%) had a kitchen or food preparation space.
- ▶ The vast majority of centres (89.7%) had decent storage space for food in the centre.
- ▶ During the process of the interview, the directors of many centres who did not have an oven spontaneously expressed regret over this fact. At the same time, some directors who had an oven at their facility spoke of it as an excellent educative tool for the children. Microwaves were never mentioned in same glowing terms.

**Local and Organic Food**

The centres were asked if they currently had organic food on the menu. They were also asked if any parents had approached them asking for organic food to be served to their children. We do not have responses for this series of questions from six of the nine centres who were already part of the Growing Up Organic Project, bringing the number of respondents for these questions down to 29. Also, the responses from the centres who do not serve snacks or meals have been excluded, which leaves a response group of 27 for this question. See table three for information on food service.

**Table Three: Some Data Concerning Local and Organic Food Use in the Surveyed Childcare Centres**

Number of respondents for this section	Number who have organic or local food on the menu	Number who have local food on the menu	Number who have had parents approach them asking for organic food on the menu
27	6	9	2

**Selected Highlights from the Interview Process in Regards to Local and Organic Food**

- ▶ Only a minority of centres (22.3%) serve organic food.

- ▶ Only a minority of centres (33.4%) serve food, which they identify as having local origin.
- ▶ Very few centres (7.4%) have had parents approach them about serving organic food.
- ▶ At this point in the survey, many directors mentioned price as a prohibitive factor in serving organic foods.
- ▶ Several directors mentioned serving garden produce in response to this question, equating the produce from these gardens with both local and organic food.
- ▶ One director mentioned that she thought home-grown and homemade food contravened health regulations.

### **Variety of Food Served**

The centres' directors were asked whether or not they served the following foods: fresh fruit, milk products, fresh vegetables, frozen fruit, meat, frozen vegetables and grains (e.g. flour, pasta, rice). We do not have responses for this series of questions from seven of the nine centres who were already part of the Growing Up Organic Project. Also, the data from one of the centres has been excluded, bringing the number of respondents for these questions down to 26. See table four for information on food service.

**Table Four: Some Data Relating to the Variety of Foods in Surveyed Childcare Centres**

Number of respondents for this section	Number who served all the foods listed above	Number who did not serve frozen vegetables	Number who did not serve meat
26	8	7	5

### **Selected Highlights from the Interview Process in Regard to the Variety of Foods Served**

- ▶ Many of the centres served most of the types of food mentioned above.
- ▶ The largest grouping of centres (30.8%) served all the foods mentioned above.
- ▶ Seven centres (26.9%) that did serve snacks served at least two snacks a day.
- ▶ It is notable that 19.3% of the centres never served meat. Although no explanation was solicited in this regard, one centre's director mentioned multiculturalism, namely requirements that some of her children eat Halal meat and do not consume pork, as a reason to avoid meat in the childcare centre.

## Food Budget and Food Suppliers

The centres' directors were asked to estimate their food budget for the year. They were also asked about the sources from which they generally purchased that food. We do not have responses for this series of questions from six of the nine centres who were already part of the Growing Up Organic program, bringing the number of respondents for these questions down to 29. Also, the responses from the centres who do not serve snacks or meals have been excluded; additionally, one respondent was unsure of where her food supply came from, leaving a response group of 26 for this question. See table five for information on food budget and food suppliers.

**Table Five: Some Data Relating to Food Budget and Food Suppliers**

Number of respondents for this section	Number who commonly bought food at Superstore	Number who used a delivery service to meet most of their food needs	Number of rural centres who most commonly purchased food at local stores
26	9	5	10

### Selected Highlights from the Interview Process in Regard to Food Service

► The data on the budget for these centres is quite varied and thus difficult to represent in a table. Of the centres surveyed, there was a great deal of disparity. Centres in the highest cohort spend over twice the amount that centres in the lowest cohort spend on food per child day, with a range between 45 cents per child per day and approximately \$1.75 per child per day, for centres serving two snacks a day.

► Only five of the centres (19.3%) used a delivery service as their main supplier of food. All of these centres were located in Winnipeg and three were with a major distributor. The others used a local grocery store, which also delivered.

► The largest number of centres (34.7%) mentioned Superstore as a place they commonly purchased food.

► All ten centres surveyed emphasized that they purchased food from a local store. Nine of ten (90%) of these establishments were local Co-Ops.

### Good Levels of Interest in the Growing Up Organic Project

24 of the new contacts that serve food to their children were given a brief description of the Growing Up Organic Project and asked if they would like a follow up call or additional information on the program. In cases where they were interviewed in person, information was either distributed directly or sent via e-mail. Based on the basic themes of connecting children to their food and healthy eating, some centres requested more information. One additional centre already had information on the program, which they

had gathered on their own accord. It follows that some 83.4% of the new centre contacts that did serve food were interested in the program and its basic principles.

## **Bakery Product Use in the Centres**

All the centres' representatives were asked a series of questions on the type, amount and source of bakery products served by the centres. Specifically, centres were asked these questions in regards to crackers, buns, cake, muffins, cookies, bread, pie, bagels, and were given the option to name other bakery products they served. Excluding the two centres that did not serve food, we analyzed data from 33 centres in this section. Please see table six for data concerning bakery product use in the centres.

**Table Six: Some Data Regarding the Use of Bakery Products in Surveyed Childcare Centres**

Number of respondents for this section	Number who served crackers as a snack regularly	Number who serve donuts on a regular basis	Most common source of cake in centres
33	32	1	Parents bringing in for birthdays

### **Selected Highlights from the Interview Process in Regard to the Use of Bakery Products in the Surveyed Childcare Centres**

- ▶ Almost all of the centres (97.0%) surveyed served crackers. The directors of the one centre that did not serve crackers mentioned that crackers were not on the menu because she was required to serve kosher food and kosher cracker were extremely difficult to locate in Manitoba.
- ▶ Across the surveyed centres, crackers are served an average of three times a week. The average serving size is approximately four crackers per child per day.
- ▶ Crackers were the most common bakery items served at the centre. Bread was the next most common, served an average across the centres of 3 times a week, with an average of one piece of bread per child per day.
- ▶ The most common homemade bakery product served at the centres are muffins. Some 44.0% of the centres that responded to this question bake muffins themselves at their centres.
- ▶ Pie is the least common of the surveyed bakery goods to be served at the centres. Only four centres (12%) served pie at all. Most of these centres indicated that they served pie once or twice a year, with one centre indicating that they served pie one time a month.

## Factors Taken into Consideration when Deciding on what Bakery Products to Serve the Children

The centres' directors were asked to rank various factors that they took into account when deciding which bakery products to serve their children with one of three descriptions: very important, important or not important. Specifically, they were asked about price, healthy ingredients, the importance of local products and the products status as certified organic. The two centres that did not serve food have been excluded, bringing the number of respondents for these questions down to 33. See table seven for information on the factors day care centres take into account when deciding on what bakery products to serve the children.

**Table Seven: Some Data on the Importance of Certain Factors that Affect the Choice of Bakery products in Surveyed Childcare Centres**

Factor	Number of centres who ranked this factor as very important	Number of centres who ranked this factor as important	Number of centres who ranked this factor as not important	Number of Respondents for this section
Price	17	14	2	33
Healthy Ingredients	28	3	2	33
Local Product	2	14	17	33
Certified Organic	1	7	26	33
Location of Supplier	12	12	9	33

### Selected Highlights from the Interview Process in Regard to Factors Taken into Account when Deciding what Bakery Products to Serve Children at the Childcare Centres

► The vast majority of centres (94.0%) believed that both price and healthy ingredients were either very important or important considerations to take into account when deciding which bakery products to serve the children. Between the two factors, healthy ingredients (84.9%) received more “very important” responses than price (51.5%).

► Unsolicited, a number of centres stated that while they rank local product as not important at this time they did believe that it should be important. In a related area, one director even termed the local product factor important but confessed that it has yet to purchase local products for her centre.

► Again unsolicited, when ranking “certified organic” as not important, several directors indicated in no uncertain terms that they thought it should be important but that cost was holding them back.

► Although not formally given this option, a couple of centre directors expressed the view that the taste of the bakery products was a very important factor when they were deciding what to give the children.

► It is interesting to note that three of the centres that ranked location of supplier as unimportant, without solicitation, stated they made that choice because they used a delivery service.

### **Current Cracker Use in the Centres and the Willingness to Pay A Premium for Similar Sizes of Local Organic Crackers**

The centres’ directors were asked about the brand or type of cracker they served in the greatest quantity. They were also asked about the size of the packages they normally served at the centre and what amount they would be willing to pay “extra” for the same type of healthy, local organic crackers. The two centres that did not serve food have been excluded, bringing the number of respondents for these questions down to 33. See table eight for information concerning current cracker use in the centres and a wiliness to pay a premium for similar sizes of local organic crackers.

**Table Eight: Some Data Concerning Current Cracker Use in the Centres and the Willingness to Pay a Premium for Similar Sizes of Local Organic Crackers**

Number of Respondents for this section	Number who were willing to pay more for a healthy local organic cracker in the same size	Most commonly served brand of cracker at the centres	Most common package size
33	30	Ritz	900g

### **Selected Highlights from the Interview Process in Regards to Current Cracker Use in the Centres and the Willingness to Pay a Premium for Similar Sizes of Local Organic Crackers**

► The vast majority of centres’ directors (90.9%) were willing to pay a premium for locally produced healthy organic crackers. For instance, on average across the centres surveyed, the directors indicated that they would be willing to pay a premium of about \$2.50 for a 900g package of local organic crackers.

► Unsolicited, all the centres’ representatives that I spoke with indicated that they bought the largest package size of crackers that was available to them, given their food supplier and the type of cracker sought.

► Only four centres’ directors (12.1%) currently purchase crackers in bulk.

► Just over half (51.6%) of the centres most commonly buy a 900g package size of crackers.

### **Comments on Potential Ingredients for a Made-in-Manitoba Cracker**

The centres’ directors were asked to indicate whether or not they thought certain ingredients would be good for a made-in-Manitoba cracker. Specifically, they were asked about sunflower, hemp, white flour, whole wheat flour and spelt. All the centres’ representatives responded to at least part of this series of questions, only some were unsure about certain ingredients (most commonly spelt) and declined to answer in regards to specific ingredients. See table nine for data on the childcare centres representatives’ opinions regarding the suitability of certain ingredients for a made-in-Manitoba cracker.

**Table Nine: Some Data on Potential Ingredients for a Made-in-Manitoba Cracker**

Ingredient	Number of Respondents who thought that the ingredient would be good for a made-in-Manitoba cracker	Number of Respondents for this Ingredient
Sunflower	25	35
Hemp	19	34
White Flower	15	35
Whole Wheat Flower	35	35
Spelt	17	29

### **Selected Highlights from the Interview Process in Regards to Potential Ingredients for a made-in-Manitoba Cracker**

► All of the centres’ representatives (100%) indicated that whole wheat flour was a good ingredient-for a made-in-Manitoba cracker. Unsolicited, a good number of the directors interviewed said that they much preferred whole wheat flower to white flour, although one mentioned that she would be willing to buy white flour products for the children under her charge if they represented a savings.

► The ingredient that raised the most safety concerns amongst directors was sunflower. About one quarter of the directors (including some that thought it was a good ingredients for a made-in-Manitoba cracker) expressed concerns about allergies or seeds as choking hazards. One respondent quipped that sunflower seeds would be good for her but not for the children under her charge.

► There is a spelt awareness issue amongst Manitoba Childcare directors. About half of the directors I spoke with relayed to me that they had not heard of spelt. At the time, I used this as an opportunity to explain something about the ancient grain.

► Unsolicited, three centres directors mentioned that they would not be interested in hemp in a local Manitoba cracker due the social stigma, which associates the plant with recreational marijuana use.

► Unsolicited, several directors mentioned concerns about taste in regards to certain ingredients. Most commonly, this concern was expressed in regards to hemp. One centre’s director thought that it was very hard for kids to acquire a taste for any of the ingredients save white flour; however, she was that only individual who expressed this view throughout

► The least popular ingredient (48.6% approval rating) for a made-in-Manitoba cracker amongst the childcare centre directors was white flour.

### **Interest in a Bulk Quantity of Local Organic Crackers for the Childcare Centres**

The centres’ directors where asked if they where interested in the possibility of a bulk size of local organic crackers. If they answered in the affirmative, they where also asked if they thought a 2KG, 5KG or 10KG size would be most helpful to their situation. Finally, they were invited to share their thoughts on why or why not a bulk size of healthy organic crackers would be of use to them in their centres. I have excluded the two Childcare facilities that do not purchase food for the children at their centres, bringing the number of respondents for these questions down to 33. See table ten for information on the suitability of a bulk size of made-in-Manitoba organic crackers to the childcare centres situation.

**Table Ten: Some Data on the Suitability of a Bulk Size of Local Organic Crackers for Childcare Centres**

Number of respondents for this section	Number who expressed interest in a bulk size of made-in-Manitoba crackers	Number who were interested in a 2KG size	Most common concern about sizes larger than 2KG
33	29	17	Freshness

### **Selected Highlights from the Interview Process in Regards to the Suitability of a Bulk Size of Local Organic Crackers**

► The vast majority of centres’ directors (87.9%) indicated an interest in a bulk size of crackers.

- ▶ The most common reason offered for interest in a bulk size of healthy local organic crackers was the savings that could bring the cost to the childcare centres in line with what they currently pay for conventional (non-organic, non-local) crackers.
- ▶ Most of the centres (58.7%) who were interested in buying local organic crackers thought that a 2KG size would be most suitable.
- ▶ One director said that a coupon for sampling would be of interest to her because it would help her assess whether or not the crackers appealed to the children's palate.

## **PART 2: RETAILER, BAKERY AND DISTRIBUTOR SURVEY RESULTS**

### **Background to Retailer, Bakery and Distributor Surveys**

Most Manitobans buy their food from retailers. Retailers provide an important link via which new products can reach childcare centres and the general public. Another important link in the supply chain is distributors. Distributors' role in getting food to institutions, and increasingly individuals, in Manitoba takes on greater significance as these stakeholders becomes burdened with the demands of contemporary life. Finally, since determining the feasibility of developing a made in Manitoba cracker is the main aim of this study, local bakeries are also important project stakeholders as they would be the locations where any made-in-Manitoba local organic cracker would be baked.

As described above, we designed three separate, but similar, interview instrument for this part of the survey (see Appendices for copies of these surveys). These instruments were used when conducting in depth interviews with seven retail managers, six bakery operators and a manager at a local distribution company. In total, approximately eleven retailers, twelve bakeries and ten distributors were approached to complete the survey. Many of the larger distributors indicated that they were not interested in this project because it was too small scale. However, the one manager from a distribution company that did participate provided valuable insights through an in-person interview. The bakeries that agreed to participate were all community-oriented operations that were both bakeries and retail locations, all but one with a restaurant attached to its baking location. Two of these interviews were done over the telephone by a volunteer, a fellow graduate student at the University of Manitoba, Harun Cicek, and the other four were conducted in person by the author, on the premises of the bakeries. Both the distributor and the bakeries were located within the city of Winnipeg.

The retail portion of the survey was administered by a volunteer, Melanie Mills, by telephone. Ms. Mills' background is in Management Studies, and as a former employee of Statistics Canada, she was considered a particularly good choice to conduct this portion of the project. She was able to generate relevant raw data from conversations with a wide range of retailers in the City of Winnipeg.

## Current Availability of Local Crackers and Market Demand Perception

The bakers, distributors and retailers were asked if they currently carried a local cracker. They were also asked if they experienced a demand for local crackers or local organic crackers amongst their customer base. Additionally, the retailers were asked which factor was more important to their customer base “local” or “organic”, and which cracker brand or type they sold in the greatest quantity. See table eleven for insight on the availability of local crackers and perception of market demand amongst stakeholders.

**Table Eleven: Some Data Concerning the Current Availability of Local Crackers and the Perception of Market Demand for those Crackers**

Stakeholder	Number of interview participants	Number who currently bake or sell a local cracker	Number who perceived a market demand for a local cracker or a local organic cracker
Bakeries	6	1	1
Retailers	7	1	6
Distributors	1	0	1

### Selected Highlights from the Interviews concerning Market Perception and Current Availability of Crackers

► It is interesting to note that in relation to the data in table eleven, almost all the retailers (85.8%) and the distributor felt that there is a market demand for a local organic cracker in Manitoba. The one baker who currently produces crackers in Manitoba also agreed that there was a demand. Additionally, another baker who did not feel that there was a market did mention that the crackers sold well when she produced them in the past.

► When asked which factor was more important to their customer base - local or organic, two retail managers (28.6%) responded that they were equal, while the other five (71.5%) responded that organic was most important to their customer base.

► The baker that currently produces local organic crackers and supplies the retailer mentioned above, makes three varieties Spicy Corn, Buck Wheat, and Wild Rice, which sell for about \$1 an ounce.

► The managers of the major retailers surveyed reported that Christie brand crackers, the makers of Ritz and Triscuits, sold in the greatest quantity.

► One the managers of the specialty retailers surveyed was very pleased with the way Salba crackers sold.

## Potential Ingredients for a Made-in-Manitoba Cracker

The managers of the bakeries, retail stores and the delivery service were asked to indicate whether or not they thought certain ingredients would be good for a made-in-Manitoba cracker. Specifically, they were asked about sunflower, hemp, white flour, whole wheat flour, flax and spelt. They were also asked if they thought any other ingredients would be good to include in a made-in-Manitoba cracker. Additionally, retailers were asked what flavours of crackers would be suitable for a made-in-Manitoba cracker. See table twelve for information on the managers' opinions regarding the suitability of certain ingredients for a made-in-Manitoba cracker.

**Table Twelve: Some Data on Potential Ingredients for a Made-in-Manitoba Cracker**

Ingredient	Number of Respondents who thought that the ingredient would be good for a made-in-Manitoba cracker	Number of Respondents for this Question
Sunflower seeds	13	14
Hemp	13	14
White Flower	6	14
Whole Wheat Flower	14	14
Spelt	13	14
Flax	14	14

### Selected Highlights from the Interview Process in Regards to Potential Ingredients for a made-in-Manitoba Cracker

► All of the managers (100%) indicated that whole wheat flour was a good ingredient for a made-in-Manitoba cracker. Unsolicited, a number of the managers interviewed said that they much preferred whole wheat flour to white flour, although one mentioned that she would require that whole wheat flour be stone ground.

► The vast majority of the managers (92.9%) surveyed thought that hemp, sunflower seeds and spelt would be good ingredients for a made-in-Manitoba cracker. Interestingly, the sole objecting voice in each of these cases was a different bakery's manager, who had not yet produced a cracker.

► The least popular ingredient (42.9% approval rating) for a made-in-Manitoba cracker amongst these stakeholders was white flour. However, the bakers that have experience making local crackers were both amongst those who said white flour would be a good component.

► The most popular additional ingredient suggested by the managers was corn. Other suggestions included sesame seeds, sun dried tomatoes, dried herbs and bran.

► On average, the retailer recommended that a local made-in-Manitoba cracker should come in three or four flavours, with larger retail managers more likely to favour a greater number of flavours.

### **Factors Considered when Stocking Crackers for Sale**

The managers of the retail stores and the delivery service were asked to rank various factors as either very important, important or not important. Specifically, they were asked to rank price, healthy ingredients, local ingredients, certified organic, location of supplier, packaging size and label look. Additionally, the retail and distribution managers were invited to list some other factors that they thought of as important. There were eight respondents for each data set. See table 13 for information on the managers’ opinions regarding the selected factors in terms of deciding what type of crackers to stock in the businesses under their charge.

**Table 13: Some Data on Factors Considered When Deciding which Cracker to Stock**

Factor	Number of managers who ranked this factor as very important	Number of managers who ranked this factor as important	Number of managers who ranked this factor as not important	Number of respondents for this section
Price	4	3	1	8
Healthy in Ingredients	6	2	0	8
Local Product	3	5	0	8
Location of Supplier	3	5	0	8
Certified Organic	3	3	2	8
Packaging Size	2	2	4	8
Label Look	1	7	0	8

### **Selected Highlights from the Interview Process in Regards to Factors Considered When Deciding Which Cracker to Stock**

► All of the managers (100%) indicated that healthy ingredients, local product and location of supplier were either important or very important factors to take into consideration when deciding which crackers to stock in their business. The factor that was ranked the highest was “healthy”, which was deemed very important by 75% of the managers.

► The least popular ingredient amongst these stakeholders was white flour.

► The most frequently mentioned additional factor was taste. Other factors mentioned included marketing and overall presentation. One manager of a specialty store suggested

that the Organic Food Council of Manitoba – COG might review the packaging and presentation of the Late July brand of cracker. Another manager mentioned that it was important that the product be produced under proper hygienic conditions. Yet another manager of a major retailer said publicity would be key and asked the volunteer to let him know if OFCM-COG had any local products to promote. A couple of managers thought that the shelf life of a local cracker would be an important factor, with the distributor recommending a shelf life of about three months.

► The manager at the distribution company indicated that storage space for a healthy organic cracker was readily available at their facility.

### **Current Size of Crackers Sold, Possibilities for the Future and Willingness to Pay a Premium for a Healthy, Made-in-Manitoba Cracker in the Same Size**

The managers were asked to list the sizes of crackers that they currently sell from a list of sizes. They were also asked if they would be willing to pay a premium over conventional (non-organic) crackers in that same size for a healthy, made-in-Manitoba organic cracker. Additionally, managers were asked if they would consider selling a bulk size (2KG or larger) of healthy, made-in-Manitoba crackers. There were eight respondents for all questions. See table 14 for some data in relation to size of crackers and the willingness of managers to pay a premium for local organic crackers in the same size.

**Table 14: Some Data in Relation to the Size of Crackers Currently Sold, Possibilities for the Future and the Willingness to Pay a Premium for Local, Made-in-Manitoba Crackers**

Number of respondents who sold 250g or less sizes	Number of respondents who currently sold 450g sizes	Number of respondents who currently sold 900g sizes	Number of respondents willing to pay a premium for a local, made-in-Manitoba	Number of respondents willing to sell a local Manitoba cracker in a bulk size
8	2	1	8	2

### **Selected Highlights from the Interview Process in Regards to the Size of Crackers Currently Sold, Possibilities for the Future and the Willingness to Pay a Premium for Local, Made-in-Manitoba Crackers**

► All of the managers surveyed (100%) were willing to pay a premium over the price they paid for conventional crackers for a healthy, made-in-Manitoba organic cracker. The average premium for a 250 g or less size was about 90 cents, with the most common answer being 50 cents. The two major retailers who currently carried 450g were both willing to pay a one dollar premium for the local, organic cracker. The one retail manager who stocked the 900g box said he stayed away from larger sizes of crackers, except in the

case of soda crackers, and was not willing to stock a 900g box of made-in-Manitoba crackers.

► Only two respondents (25%) said that they would definitely be interested in stocking a bulk size of local, organic crackers. However, one of the respondents who indicated this willingness was a distributor, and another manager said he would perhaps stock a bulk size of crackers after first seeing the product. The distributor thought that institutions would provide a solid market for a bulk package of healthy, made-in-Manitoba crackers.

► The reason given for not wanting to stock a local organic cracker were concerns over health and safety (allergies), a concern that a bulk size would require a large number of preservatives, head office restrictions, which only allowed the sale of packaged food, a concern about freshness and a fear that bulk size would cause many crackers to fracture.

### **Baker Specific Issues Concerning the Production of a Local Cracker**

The bakers were asked to rank several factors that might affect the production of a local, made-in-Manitoba cracker as either a very large barrier, somewhat of a barrier or not a barrier at all. Specifically, they were asked to rank cost of ingredients, obtaining certified organic ingredients, location of supplier of ingredients, obtaining local ingredients and uncertainty of market demand. They were also invited to name other factors that they considered important. There were six responses to each of the set questions. See table 15 for some data in relation to factors affecting the bakers’ production of a local organic cracker.

Table 15: Data Concerning some Factors Affecting Bakers’ Production of a Made-in-Manitoba Cracker

Factor	Number of bakers who ranked this factor as a very large barrier	Number of bakers who ranked this factor as somewhat of a barrier	Number of bakers who ranked this factor as not important
Cost of Ingredients	3	0	3
Obtaining Certified Organic Ingredients	0	0	6
Obtaining Local Ingredients	1	0	5
Uncertainty of Market Demand	0	2	4

## **Selected Highlights from the Interview Process in Regards to the Factors Affecting Bakers' Ability to Produce a Made-in-Manitoba Cracker**

- ▶ No baker thought that uncertainty of market demand was a major barrier to the production of a local organic cracker.
- ▶ All the bakers agreed that obtaining certified organic ingredients was not a barrier to the production of a healthy organic cracker in Manitoba. Unsolicited, most respondents said it was not a barrier because they had good relationships with the farmers who supplied the ingredients. One baker did, however, mention that he did sometimes have problems obtaining certified organic ingredients in the winter.
- ▶ One baker stated that she originally started in the business to help the farmers but now she realizes that her bakery employees depend on her, as well. She viewed this new realization as a positive change, showing the depth of relationship between everyone in her business and the farmer.
- ▶ Another baker lamented about the ingredients in conventional crackers, saying that there was more to life than Christie. In light of the principles of the Growing Up Organic Project, which she supported, she was particularly upset that children were being served such products. She was particularly concerned because of the fact that products such as Ritz brand crackers are made with large amounts of shortening and cooked via deep-frying processes.

## **Baker Specific Issues Concerning the Viability of a Made-in-Manitoba Cracker**

The bakers were asked whether they currently had the capacity on site to produce crackers. They were also asked whether or not they thought producing a healthy, local organic cracker would add value to their business. Additionally, they were offered the chance to comment upon or explain their answer. There were six responses to the two sets of questions. See table 16 for some data on baker specific issues concerning the viability of a local, made-in-Manitoba cracker.

**Table 16: Some Data on Baker Specific Issues Concerning the Viability of a Made-in-Manitoba Cracker**

Number of bakeries with the current capacity to produce crackers	Number of bakers who feel producing a healthy, made-in-Manitoba cracker would add value to their business
5	4

## **Selected Highlights from the Interview Process in Regards to the Viability of a Made-in-Manitoba Cracker**

▶ A strong majority of the bakers (83.4%) stated they had the on-site capacity to produce crackers.

▶ One baker who currently produces crackers affirmed that crackers had added value to her business. She said you can only sell so much bread and that cracker sales did not compete or decrease sales of her regular products.

▶ One baker, who had produced crackers but could not make them right now due to lack of a baker with the necessary skills, felt that the cracker had added value to her business, especially at Christmas time when people looked for quality crackers to match their fine cheeses.

▶ In commenting on the potential for an organic cracker to add value to his business, one baker said that he thought a homemade cracker was something special in a world of mass produced food.

▶ Some bakers chose to speak about additional issues. One mentioned that the process was quite labour intensive because the crackers had to be cut by hand. Two others pointed out that a great advantage of crackers was that they had a longer shelf life than bread.

## **SECTION D: KEY FINDINGS**

### **1. The Vast Majority of Interview Participants Felt that Healthy Food was Important and Associated Organic Food as a Healthier Alternative to Non-Organic Food**

▶ This is a solid foundation upon which to establish better relationships between children and their food in Manitoba.

▶ In the survey, whole wheat flour enjoyed a similar status to organic food, being universally deemed a good ingredient for a made-in-Manitoba cracker-

▶ Childcare centres are “on board” philosophically with the idea that organic options are healthier for their children. However, many directors faced with scarce resources and provincial requirements to pay their staff higher wages are wary of the extra cost associated with organic food.

### **2. Healthy organic crackers appear to be a good choice to break the hold that less healthy crackers generally purchased by child care centres have.**

▶ One of the local bakers summed this insight up nicely: she that said that there is more to life than Christie. Crackers used to be a healthy food baked, but now they are full of shortening and deep-fried. It follows for her that-children’s pallets for crackers is being negatively affected with detriments for their health by eating present off the shelf products. Our children need a better alternative.

▶ Crackers were demonstrated to be the most frequently served snack across the board at childcare centres surveyed. As mentioned by one of the bakers, they also have a longer shelf life than most other bakery products, including the second most served item on the childcare centres snack menu, bread.

▶ Ritz crackers and their imitators are the most commonly served type of cracker in the Manitoba childcare centres. This represents a disconnect with other data generated from conversations with the childcare directors during which they stated a preference for healthier food.

### **3. Children Enjoy and are Excited by Forming More Substantial Relationships with their Food**

▶ Observing the outreach activities associated with this research, namely educational activities, one can conclude that the children at childcare centres genuinely enjoyed and were excited about learning about connections with their food. At one centre, the children actively sought to assert that organic food was superior to all other forms of nourishment, even going to far as to “cheat” on a taste test to ensure they picked organic options.

► Local food activist Dr. Cathy Campbell is fond of repeating the mantra “food justice tastes delicious”. By food justice, Dr. Campbell refers to finding ways to form better relationships (inclusive of production and distribution) with the food we eat. The sentiments associated with that mantra appeared throughout the course of this research, no time more so than in the restaurant of a local bakery after we had toured the facility and one child quipped, “this treat tastes better because I know the baker”.

## **SECTION E: RECOMMENDED ACTIONS**

One of the major objectives of this study was to develop short and long-term action plans to help connect children to their food and to assess the viability of a local organic cracker for the Manitoba context.

The study's findings point to five main factors that form the basis for the action plan:

- 1) The vast majority of stakeholders surveyed indicated a strong level of interest in healthy food.
- 2) The vast majority of stakeholders surveyed equated organic food with healthy food and requested more information about how to access such food through the Growing Up Organic Project.
- 3) There exists a “price problem” that prevents childcare directors from committing to the purchase of the organic food, which they recognise as a healthier option for the children under their charge.
- 4) A bulk size of healthy local crackers could be a key first step towards creatively solving the “price problem” regarding organic food in Manitoba.
- 5) A bulk size of healthy organic crackers, perhaps most importantly, represents a real option for helping to establish better relationships between Manitoba children and their food.

### **Recommended Actions: Childcare Centres**

- ▶ Find ways to foster even greater growth in Growing Up Organics outreach and educational activities.
- ▶ Reconnect with the 83% of “new contact” centres who expressed an interest in the Growing Up Organic project, as soon as possible. Personal contact, although time consuming, proved to be highly effective when conducting these interviews. Building on those initial contacts could help Growing Up Organic to begin working with some of the centres who provided the valuable interview data.
- ▶ Publicize this report and related documents as widely as possible.
- ▶ Continue efforts to have children meet the people that produce their food.
- ▶ Show our children the social costs of unhealthy food. Foster in them a sense of “food justice”. Children have a strong sense of right and wrong. Find ways of delivering insight about care for the earth and the inequalities of the mass food production system, not only for the farmer but for the urban poor, who too often eat disproportional amounts of unhealthy, highly processed foods.

- ▶ Foster in our children the insight shared by Rachel Carson *In Silent Spring*, namely that artificial pesticides are poisons that target the diversity of the natural world and by entering the food chain, harm human health. Organic agriculture offers a vision of food production free from harmful chemicals.
- ▶ Allow our children to experience key moments in the agricultural cycle such as planting, weeding and harvest, through farms tours and community gardens. Unlike schools, childcare centres are in session most of the year and represent a unique opportunity in this regard.
- ▶ Develop educational materials that are specifically designed to appeal to decision makers in childcare centres. The more directors and boards of childcare centres understand about the positive social and health effects of children entering into better relationships with their food, the more likely they are to allow the Growing Up Organic Project to operate in their facility. These peoples are like gatekeepers to the children under their charge, fostering their trust and understanding of the program will benefit all concerned.
- ▶ A very specific document could be developed that targets the spelt awareness issue (especially if spelt is to be one of the ingredients in healthy local cracker). Spelt could be used as a focus to gain insight into the broader issues surrounding the organic movement.
- ▶ Investigate the model described by a local baker, which is currently in place in New Zealand, for the mandatory provision of organic food to childcare centres.
- ▶ Lobby our provincial government, which has responsibility for both health and education in the Manitoba context, for similar government supported initiatives to be integrated into the present childcare reform initiatives.
- ▶ Work to find creative solutions to the “price problem” with organic food. This should be a multidirectional movement through which society (and childcare centres in particular) come to acknowledge the real cost to people and the planet of unsustainable agricultural practices. A program such as Growing up Organic could facilitate the realisation of price parity through such a groundbreaking project.
- ▶ If resources permit, the programming portion of these creative solutions ought to include contacting parents of children. Our research shows that very few parents had approached their director to ask for more organic food on the menu. Parents are the first educators and the values they model and foster in their children almost inevitably mark them for life. Also, two centres abandoned food service because of concerns about allergies. In the case of those two centres, parental support is the only means to get organic food regularly into the centre. In these cases, a parents’ meeting may be appropriate.

► There may exist an opportunity for some dialogue between Growing Up Organic Project and childcare centres that have a majority or significant minority of Jewish or Islamic children, because central tenants of those faiths demand ethical relationships with food.

### **Recommended Actions: Bakers, Retailers and Distributors**

► Arrange for some childcare centres to sample currently available organic crackers. Corn crackers may be a good start, as one of the bakers explained they seem to taste good to children and provide calcium for their bones.

► Form a partnership between local childcare centres, a local baker and possibly a retailer or distributors for a trial run of a 2KG size of healthy, made-in-Manitoba crackers. Include educational components with the trial, with personal representation, so that the baker visits the childcare centres and the childcare centres visit the baker. As much as possible, include everyone involved in the production of the cracker, from farmers to bakery workers to delivery drivers. Whole wheat flour would appear to be well poised to be one of the ingredients of this cracker due to its universal characterization as a good ingredient for a healthy, local organic cracker.

► Publicize this report and related documents as widely as possible.

► Assess the potential of forming a partnership with the CO-OP movement in Manitoba. They have a well-established network for reaching rural Manitobans and believe in the principles of cooperation and healthy communities so important to the Growing up Organic Project. Also, some 80% of rural day care centres surveyed indicated that their local Co-Op was their main food supplier.

► Should a local cracker prove successful, a long term goal may be to develop creative ways of getting local organic bread served regularly in Manitoba's childcare centres.

## **SECTION G CONCLUSION**

Children are the future. If we are to foster a more sustainable society, we must start making choices today that care for the health of our children, society and the planet. This research shows that a local organic cracker, distributed to childcare centres, could have the potential to help create a more sustainable Manitoba. Right now, we have an historic opportunity to help “grow” healthy children, a healthy society and to ensure healthy communities for generations to come. By working to make a healthy local cracker part of the learning journey that Manitoba children experience in our childcare centres, we will be taking the first steps towards this much needed growth.



- f) Flax\_\_\_\_\_
- g) Other (Please name)\_\_\_\_\_

4. If you do bake crackers (or were to bake crackers)...What type of crackers do you currently or would you produce?

5. In terms of deciding about the viability of a made-in-Manitoba cracker, *how would you rank the following factors*. Please rank each of the following factors as *very large barrier, somewhat of a barrier, not a barrier at all*.

Cost of Ingredients\_\_\_\_\_

Obtaining Certified Organic Ingredients \_\_\_\_\_

Location of Supplier of Ingredients\_\_\_\_\_

Obtaining Local Ingredients\_\_\_\_\_, if large barrier.. which ingredients, specifically??

Uncertainty of market demand\_\_\_\_\_

Other (Please name)\_\_\_\_\_

6. If you do bake crackers...In what formats do you currently produce crackers for distribution? Please mark all that are applicable.

a) A 225 or less g format\_\_\_\_\_  
(The equivalent of two rows of soda crackers)

b) A 450g format \_\_\_\_\_  
(The equivalent of four rows of soda crackers)

c) A 900g format \_\_\_\_  
(The equivalent of eight rows of soda crackers)

d) Bulk quantity, if so approximately in what amounts\_\_\_\_\_

7. Do you currently have the capacity on-site to produce crackers?

8. Do you feel producing a healthy local organic cracker would add value to your business? Why or why not?

9. What other concerns or thoughts do you have regarding the viability of local healthy organic crackers from Manitoba?

Thank you very much for taking the time to complete this survey.

## Appendix B: Made-in-Manitoba Organic Cracker Distributor Survey

**Name of location:**

**Name of contact person:**

**Address:**

**Phone/ e-mail:**

The Organic Food Council of Manitoba, a chapter of the Canadian Organic growers is involved in a national project called Growing Up Organic. The project introduces local organically grown food into child care centres and other institutions across Canada. We have a number of childcare facilities in Manitoba that are already buying organic food through our program. Recently, we have received funding from the Canadian Wheat Board to assess the viability of healthy made-in-Manitoba organic crackers. Your participation in this survey will help determine **the local capacity for storage and distribution of such crackers in Manitoba**. Your responses will be compiled, presented and stored in a manner that does not identify you. Should you have any questions about the survey, please contact our Growing Up Organic program office at 204-772-4363 or send an e-mail to [guo-ofcm@cog.ca](mailto:guo-ofcm@cog.ca)

1. Do you currently carry a local cracker? (If yes, please provide the brand name of the cracker and the price at which it sells).
  
2. Among your customer base, is there a demand for local crackers in Manitoba? Please explain. How about a local organic cracker?
  
3. Would your customer base purchase a made-in-Manitoba organic cracker with the following components? Please answer yes or no.
  - h) Hemp \_\_\_\_\_
  - i) White flour \_\_\_\_\_
  - j) Whole wheat flour \_\_\_\_\_
  - k) Spelt \_\_\_\_\_
  - l) Sunflower \_\_\_\_\_
  - m) Flax \_\_\_\_\_
  - n) Other (Please name) \_\_\_\_\_

4. In terms of deciding what crackers brands to distribute, *how would you rank the following factors*. Please rank each of the following factors as very important, important, or not important

Price\_\_\_\_\_

Healthy Ingredients\_\_\_\_\_

Local Product\_\_\_\_\_

Certified Organic \_\_\_\_\_

Location of Supplier\_\_\_\_\_

Packaging size\_\_\_\_\_

Label Look\_\_\_\_\_

Other (Please name)\_\_\_\_\_

5. What brand/type of cracker do you currently distribute in the greatest quantity?

6. What (by volume **or** dollar amount) are your total cracker sales in one month?

7. Approximately how much storage space is your facility able to devote to storing and shelving a Manitoba organic cracker?
8. If you were to carry a local organic cracker what amount of time to suggested expiry dates do you think is reasonable?
9. In what formats do you currently buy crackers for distribution? Please mark all that are applicable.
- e) A 225 or less g format \_\_\_\_  
(The equivalent of two rows of soda crackers)
- f) A 450g format \_\_\_\_  
(The equivalent of four rows of soda crackers)
- g) A 900g format \_\_\_\_  
(The equivalent of eight rows of soda crackers)
- h) Larger quantity, if so approximately in what amounts \_\_\_\_

10. In answering the last question you indicated that you currently buy crackers in certain sizes. How much **extra** would you be willing to pay for healthy local organic crackers in those same sizes (compared to conventional...i.e non-organic)? Please answer all that are applicable.

a) A 225 or less g box

i) 50 cents\_\_\_\_\_ ii) \$1\_\_\_\_\_ iii) \$2\_\_\_\_\_ iv) other\_\_\_\_\_

b) A 450g box

i) \$1 \_\_\_\_\_ ii) \$2\_\_\_\_\_ iii)\$3\_\_\_\_\_ iv) other\_\_\_\_\_

c) A 900g box

i) \$2 \_\_\_\_\_ ii) \$3\_\_\_\_\_ iii)\$4\_\_\_\_\_ iv) other\_\_\_\_\_

d) Bulk purchase (2KG)

i) \$4 \_\_\_\_\_ ii) \$6\_\_\_\_\_ iii)\$8\_\_\_\_\_ iv) other\_\_\_\_\_

11. Is there a market in your business for distributing a “bulk” format of healthy local organic crackers?

12. Would you consider carrying a 2kg or larger size pack of local organic crackers if buyers report the demand?

13. What other concerns or thoughts do you have regarding the viability of local healthy organic crackers from Manitoba?

Thank you very much for taking the time to complete this survey.

## Appendix C: Made-in-Manitoba Organic Cracker Retailer Survey

**Name of location:**

**Name of contact person:**

**Address:**

**Phone/ e-mail:**

The Organic Food Council of Manitoba, a chapter of the Canadian Organic growers is involved in a national project called Growing Up Organic. The project introduces local organically grown food into child care centres and other institutions across Canada. We have a number of childcare facilities in Manitoba that are already buying organic food through our program. Recently, we have received funding from the Canadian Wheat Board to assess the viability of healthy made-in-Manitoba organic crackers. Your participation in this survey will help determine **the local retail market of such crackers in Manitoba**. Your responses will be compiled, presented and stored in a manner that does not identify you. Should you have any questions about the survey, please contact out Growing Up Organic program office at 204-772-4363 or send an e-mail to [guo-ofcm@cog.ca](mailto:guo-ofcm@cog.ca)

1. Do you currently carry a local cracker? (If yes, please provide the brand name of the cracker and the price at which it sells).
2. Among your customer base is there a demand for locally made crackers? Please explain your answer.
3. Which factor is more important to your customer base; local or organic?
4. What brand of cracker do you currently sell in the greatest quantity?

5. How many flavors or SKU's do you think a local organic cracker should offer?

6. In terms of deciding what crackers brands to sell, *how would you rank the following factors*. Please rank each of the following factors as very important, important, or not important.

Price\_\_\_\_\_

Healthy Ingredients\_\_\_\_\_

Local Product\_\_\_\_\_

Certified Organic \_\_\_\_\_

Location of Supplier\_\_\_\_\_

Appearance of the Label \_\_\_\_\_

Package size\_\_\_\_\_

Other (Please name)\_\_\_\_\_

7. Are you interested in carrying a made-in-Manitoba organic cracker with the following components? Please answer yes or no.

o) Hemp \_\_\_\_\_

p) White flour \_\_\_\_\_

q) Whole wheat flour \_\_\_\_\_

r) Spelt \_\_\_\_\_

s) Sunflower\_\_\_\_\_

t) Flax\_\_\_\_\_

u) Other (Please name)\_\_\_\_\_

8. In what formats do you currently sell crackers? Please mark all that are applicable.

i) A 225 or less g format \_\_\_\_\_  
(The equivalent of two rows of soda crackers)

j) A 450g format \_\_\_\_\_  
(The equivalent of four rows of soda crackers)

k) A 900g format \_\_\_\_\_  
(The equivalent of eight rows of soda crackers)

l) Bulk quantity, if so approximately in what amounts \_\_\_\_\_

9. In answering the last question you indicated that you currently stock crackers in certain sizes. How much **extra** would **you** be willing to pay for healthy local organic crackers in that same size (compared to conventional non-organic)? Please answer all that are applicable.

a) A 225 or less g format  
i) 50 cents \_\_\_\_\_ ii) \$1 \_\_\_\_\_ iii) \$2 \_\_\_\_\_ iv) other \_\_\_\_\_

b) A 450g format  
i) \$1 \_\_\_\_\_ ii) \$2 \_\_\_\_\_ iii) \$3 \_\_\_\_\_ iv) other \_\_\_\_\_

c) A 900g format  
i) \$2 \_\_\_\_\_ ii) \$3 \_\_\_\_\_ iii) \$4 \_\_\_\_\_ iv) other \_\_\_\_\_

d) Bulk purchase (2KG)  
i) \$4 \_\_\_\_\_ ii) \$6 \_\_\_\_\_ iii) \$8 \_\_\_\_\_ iv) other \_\_\_\_\_

10. Would your business be interested in selling healthy local organic crackers in a bulk format? Why or why not?

11. What other concerns or thoughts do you have regarding the viability of local healthy organic crackers from Manitoba?

Thank you very much for taking the time to complete this survey.

## **Appendix D: Child Care Centre Survey (Initial Contact)**

**Name of location:** \_\_\_\_\_

**Name of contact person:** \_\_\_\_\_

Hi. This is Chris, from the Organic Food Council of Manitoba, a regional chapter the Canadian Organic Growers. Our non-profit organization is involved in a national project to introduce local organically grown food into child care centres and other institutions across Canada. We are conducting a survey to determine what type and how much organic food is being consumed or may be consumed in the near future in Manitoba. We already have a number of childcare facilities that are starting to buy organic food through our project. Your participation in this 10 minute survey will help determine the local market for organic food.

1. How many children are there in your facility and what are the age groups?
  
2. Does your facility offer snacks and/or meals? How many snacks per day/week and meals per week? (Get both snack and meal information).
  
3. Is there a kitchen in the facility? Please describe your storage space. (e.g. shelving, fridge, freezer, capacity..... can you expand your capacity?)
  
4. Is there any organic and/or local food on the menu? (If no to organic...would you consider putting organic food on your menu?)

5. Have any of the children's parents approached you requesting more organic food on the menu?

6. I am going to read a list of different types of foods. Please indicate which ones you use. *[mark a check for yes and an x for no]*

<input type="checkbox"/> fresh fruit	<input type="checkbox"/> milk products, which ones? _____
<input type="checkbox"/> fresh vegetables	
<input type="checkbox"/> frozen fruit	<input type="checkbox"/> meat
<input type="checkbox"/> frozen vegetables	<input type="checkbox"/> grains (list for respondent ...e.g. flour, pasta, rice,
other _____	
<input type="checkbox"/> other _____	_____

7. What is your food budget for the year? What is your snack budget per child per day? What is your meal budget per child per day?

8. Which food suppliers do you get your food from? (If there is no specific one could you please tell us where do you tend to buy your food.)

9. I will read off a list of bakery products, please let me know how often (if ever) you serve the product at your centre, about how much you use each day or week and where you generally get it from

Product	Frequency	Amount/day(week)	Source
Crackers			
Buns			
Cake			
Muffins			
Cookies			
Bread			
Pie			
Donuts			
Bagels			
Other			

10. When you decide what bakery products to serve the children at your centre, *how would you rank the following factors*. Please rank each of the following factors as very important, important, or not important

Price\_\_\_\_\_

Healthy Ingredients\_\_\_\_\_

Local Product\_\_\_\_\_

Certified Organic \_\_\_\_\_

Location of Supplier\_\_\_\_\_

11. *If you don't serve crackers, please indicate why not. Then skip to question 7.*

12. What brand/type of cracker do you serve most often at your centre?

13. In what amounts do you currently buy crackers for your centre? Let me offer a few alternatives.

m) A 225 or less g box \_\_\_\_  
(The equivalent of two rows of soda crackers)

n) A 450g box \_\_\_\_  
(The equivalent of four rows of soda crackers)

o) A 900g box \_\_\_\_  
(The equivalent of eight rows of soda crackers)

p) Bulk purchase, if so approximate amount\_\_\_\_

14. In answering the last question you indicated that you currently buy crackers in xxxx size. How much **extra** would you be willing to pay for healthy local organic crackers? I will give you some choices to make this easier.

a. A 225 or less g box  
i) 50 cents\_\_\_\_ ii) \$1\_\_\_\_ iii) \$2\_\_\_\_ iv) other\_\_\_\_

b) A 450g box  
i) \$1 \_\_\_\_ ii) \$2\_\_\_\_ iii)\$3\_\_\_\_ iv) other\_\_\_\_

c) A 900g box  
i) \$2 \_\_\_\_ ii) \$3\_\_\_\_ iii)\$4\_\_\_\_ iv) other\_\_\_\_

d) Bulk purchase (2KG)  
i) \$4 \_\_\_\_ ii) \$6\_\_\_\_ iii)\$8\_\_\_\_ iv) other\_\_\_\_

15. Would you be interested in serving crackers containing the following grains or seeds at your centre?

Please answer "yes" or "no" to each of the five grains or seeds as I mention their names.

- v) Sunflower \_\_\_\_\_
- w) Hemp \_\_\_\_\_
- x) White flour \_\_\_\_\_
- y) Whole wheat flour \_\_\_\_\_
- z) Spelt \_\_\_\_\_

16. *Ok, last survey question.* Would a "bulk box" of healthy local organic crackers be of interest to you? Why or why not?

16(b). If interested..... which size would be most useful?

- a. 2KG \_\_\_\_\_
- b. 5KG \_\_\_\_\_
- c. 10KG \_\_\_\_\_

17. Would you like a follow up call and/or presentation about how your centre can access local organic food?

Thank you very much for your time your answers have been most helpful!

## Appendix E: Child Care Centre Survey (Already Part GUO program)

Name of location: \_\_\_\_\_

Name of contact person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone/ e-mail: \_\_\_\_\_

Date of Interview: \_\_\_\_\_

Time \_\_\_\_\_ End time of interview \_\_\_\_\_

Call back date & time \_\_\_\_\_

*Hi. This is Chris. I am conducting a survey for the Organic Food Council of Manitoba. You may know, that our non-profit organization is involved in the national Growing Up Organic program to introduce local organically grown food into child care centres and other institutions. We are very glad that your centre is involved in this project. The purpose of this survey is to help determine the potential viability of healthy made-in Manitoba organic crackers. Your participation will help make this possible. Do you have time for this 5-10minute interview now or can I make an appointment to call back or come see you at a more convenient time?*

***If “No” thank the person and end the call. Note above that the person does not want to participate.***

1. I will read off a list of bakery products, please let me know how often (if ever) you serve the product at your centre, about how much you use each day or week and where you generally get it from

Product	Frequency	Amount/day(week)	Source
Crackers			
Buns			
Cake			
Muffins			
Cookies			
Bread			
Pie			
Donuts			
Bagels			
Other			

2. When you decide what bakery products to serve the children at your centre, *how would you rank the following factors*. Please rank each of the following factors as very important, important, or not important

Price\_\_\_\_\_

Healthy Ingredients\_\_\_\_\_

Local Product\_\_\_\_\_

Certified Organic \_\_\_\_\_

Location of Supplier\_\_\_\_\_

3. *If you don't serve crackers, please indicate why not. Then skip to question 7.*

4. What brand/type of cracker do you serve most often at your centre?

5. In what amounts do you currently buy crackers for your centre? Let me offer a few alternatives.

q) A 225 or less g box \_\_\_\_\_  
(The equivalent of two rows of soda crackers)

r) A 450g box \_\_\_\_\_  
(The equivalent of four rows of soda crackers)

s) A 900g box \_\_\_\_\_  
(The equivalent of eight rows of soda crackers)

t) Bulk purchase, if so approximate amount\_\_\_\_\_

6. In answering the last question you indicated that you currently buy crackers in xxxx size. How much **extra** would you be willing to pay for healthy local organic crackers? I will give you some choices to make this easier.

a. A 225 or less g box

i) 50 cents \_\_\_\_\_ ii) \$1 \_\_\_\_\_ iii) \$2 \_\_\_\_\_ iv) other \_\_\_\_\_

b) A 450g box

i) \$1 \_\_\_\_\_ ii) \$2 \_\_\_\_\_ iii) \$3 \_\_\_\_\_ iv) other \_\_\_\_\_

c) A 900g box

i) \$2 \_\_\_\_\_ ii) \$3 \_\_\_\_\_ iii) \$4 \_\_\_\_\_ iv) other \_\_\_\_\_

d) Bulk purchase (2KG)

i) \$4 \_\_\_\_\_ ii) \$6 \_\_\_\_\_ iii) \$8 \_\_\_\_\_ iv) other \_\_\_\_\_

7. Would you be interested in serving crackers containing the following grains or seeds at your centre?

Please answer "yes" or "no" to each of the five grains or seeds as I mention their names.

aa) Sunflower \_\_\_\_\_

bb) Hemp \_\_\_\_\_

cc) White flour \_\_\_\_\_

dd) Whole wheat flour \_\_\_\_\_

ee) Spelt \_\_\_\_\_

8. *Ok, last question.* Would a "bulk box" of healthy local organic crackers be of interest to you? Why or why not?

8(b). If interested..... which size would be most useful?

a. 2KG \_\_\_\_\_

b. 5KG \_\_\_\_\_

c. 10KG \_\_\_\_\_

Thank you very much for your time your answers have been most helpful!