



ONTARIO AGRICULTURAL COLLEGE

Department of Food, Agricultural and Resource Economics

Results from the Guelph Food Panel 2008-03

Local Fresh Produce:

What Products are Consumers Buying?

The International Food Economy Research Group (InFERG) based in the Department of Food, Agricultural and Resource Economics (FARE) at the University of Guelph has established a panel of 2000 consumers that is representative of the city of Guelph. Guelph is routinely used by market researchers as being broadly representative of the Canadian population as a whole. The panel is used to track changes in consumer perceptions and attitudes towards a broad range of food issues. A recent panel survey focused on determining what locally-produced fresh fruit and vegetables consumers are buying.

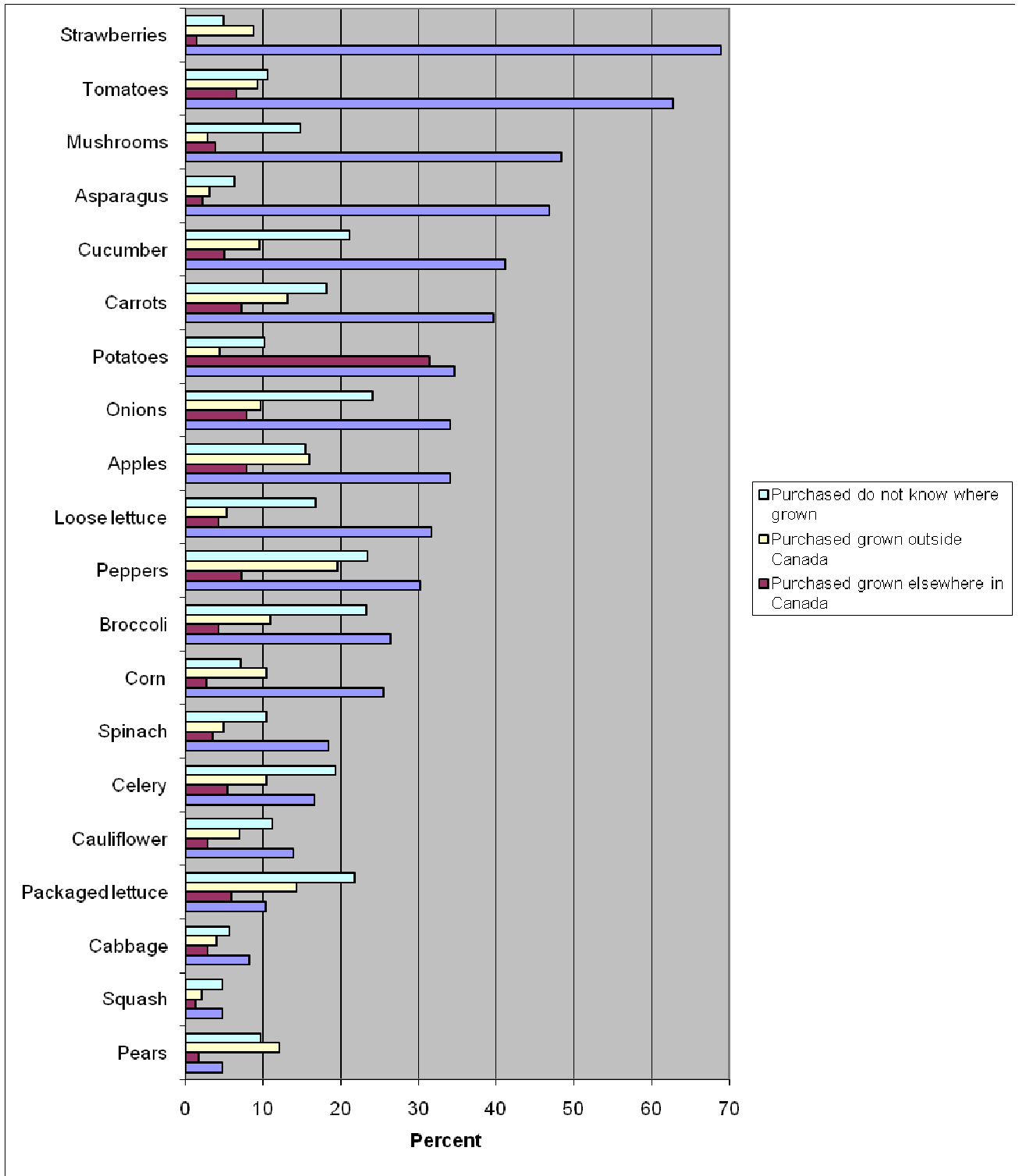
The importance of locally-produced foods has increased recently in the food supply chains of developed countries. Among the drivers of this increased interest are consumer concerns about food safety and quality as well as social and environmental impacts of contemporary global food supply chains. Further, various Canadian provinces have launched promotion programs aimed at increasing demand for locally-produced foods, such as "Foodland Ontario". As fresh fruit and vegetables play a significant role in the local food supply in Ontario, the Guelph Food Panel was surveyed to determine which of these products, produced in Ontario and elsewhere in Canada, are purchased by consumers. Some of the key results are summarised below.

The demand for locally-produced foods varies by product

Respondents were asked if they had purchased any of 20 fresh fruit and vegetables in the last two weeks and, if so, the region in which these had been produced. Figure 1 shows the proportion of consumers that had purchased products grown in different regions. The region of origin of the produce purchased by panellists varies widely, most notably the proportion that was grown in Ontario. Around 70 percent of consumers purchased strawberries produced in Ontario, followed by tomatoes (63%), mushrooms (48%), asparagus (47%) and cucumbers (41%). Conversely, only around five percent of consumers had purchased pears and squash grown in Ontario. Consumer behaviour towards local foods may be explained by preferences, but also by produce availability and seasonality.

Figure 1 also shows that, with the exception of potatoes, the proportion of consumers that purchased fresh produce grown elsewhere in Canada was generally small. The proportion of consumers that had purchased fresh produce grown outside Canada varies across products, ranging from around 20 for peppers, 16 percent for apples, 14 percent for packaged lettuce, 13 percent for carrots and 11 percent for broccoli.

Figure 1. Proportion of consumers that purchased fresh produce from Ontario, by region of origin:



Relationship between consumers' intentions and real behaviour

In a previous Guelph Food panel survey, consumers were asked how likely they would be to buy locally-produced fresh fruit and vegetables if they were easily available and cost the same as produce grown outside of Ontario (see Results from the Guelph Food Panel 2008-02). Around 77 percent of consumers responded that they would be 'very likely' to buy locally-grown produce under these circumstances. Among these consumers, around 70 percent had actually purchased Ontario-grown strawberries in the last two weeks, 64 percent had purchased Ontario-grown tomatoes, 50 percent purchased Ontario-grown mushrooms, 48 percent had purchased Ontario-grown asparagus, and 41 percent had purchased Ontario-grown cucumbers (Figure 2). Indeed there appears to be a relatively strong relationship between the propensity to buy fresh fruit and vegetables grown in Ontario and actual purchase behaviour. Thus, the proportion of consumers who actually purchased Ontario-grown strawberries, tomatoes, mushrooms and asparagus was higher among consumers with a high purchase intention for locally-grown fresh produce than among consumers with a lower purchase intention (Figure 3). While the difference between actual and intended purchase behaviour is small for a number of other products (for example pears, celery and carrots), here purchase intention is not reflected in actual buying behaviour.

Figure 2. Proportion of consumers that actually purchased locally-produced fruit and vegetables as they had stated in their purchasing intentions:

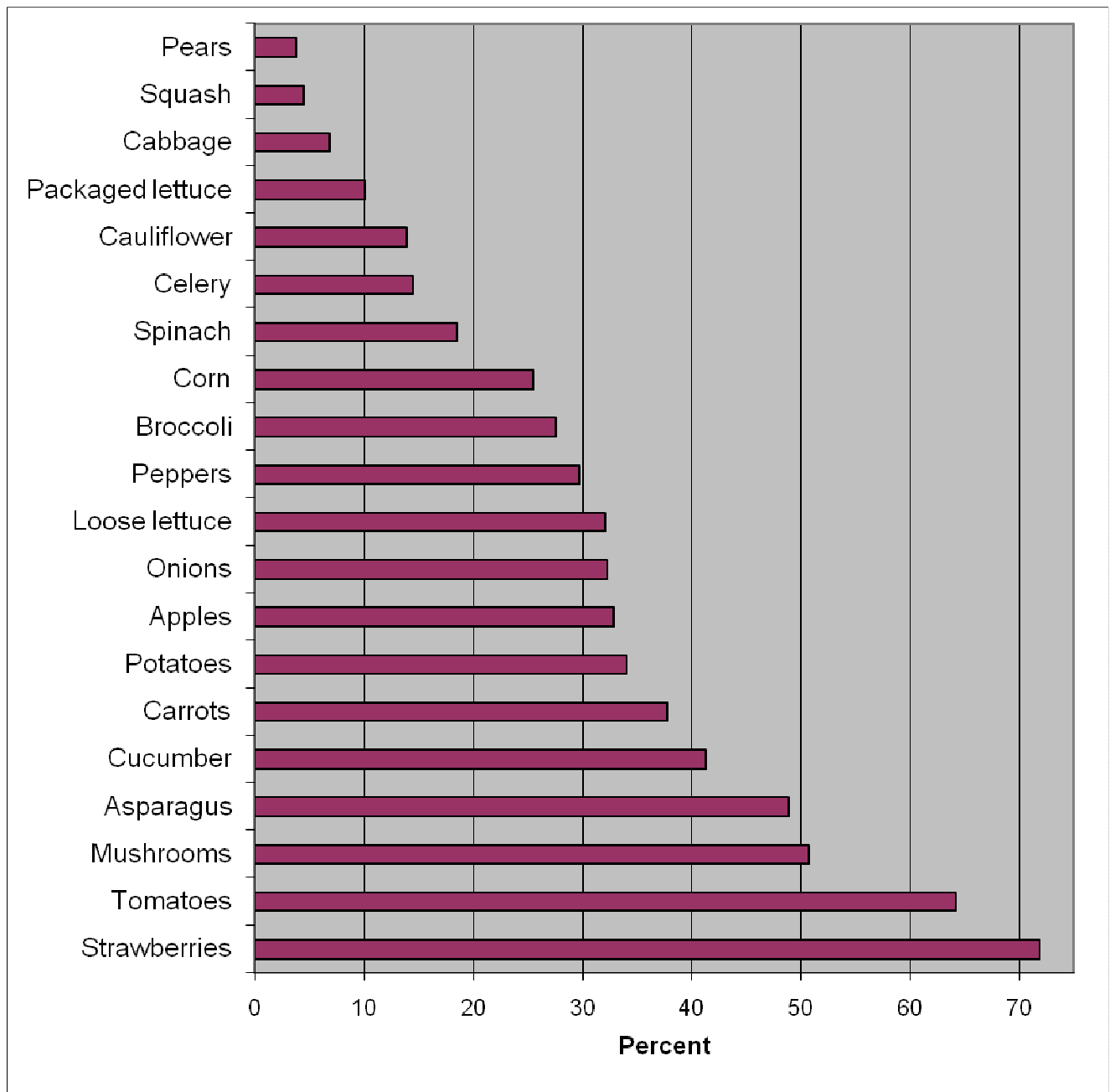
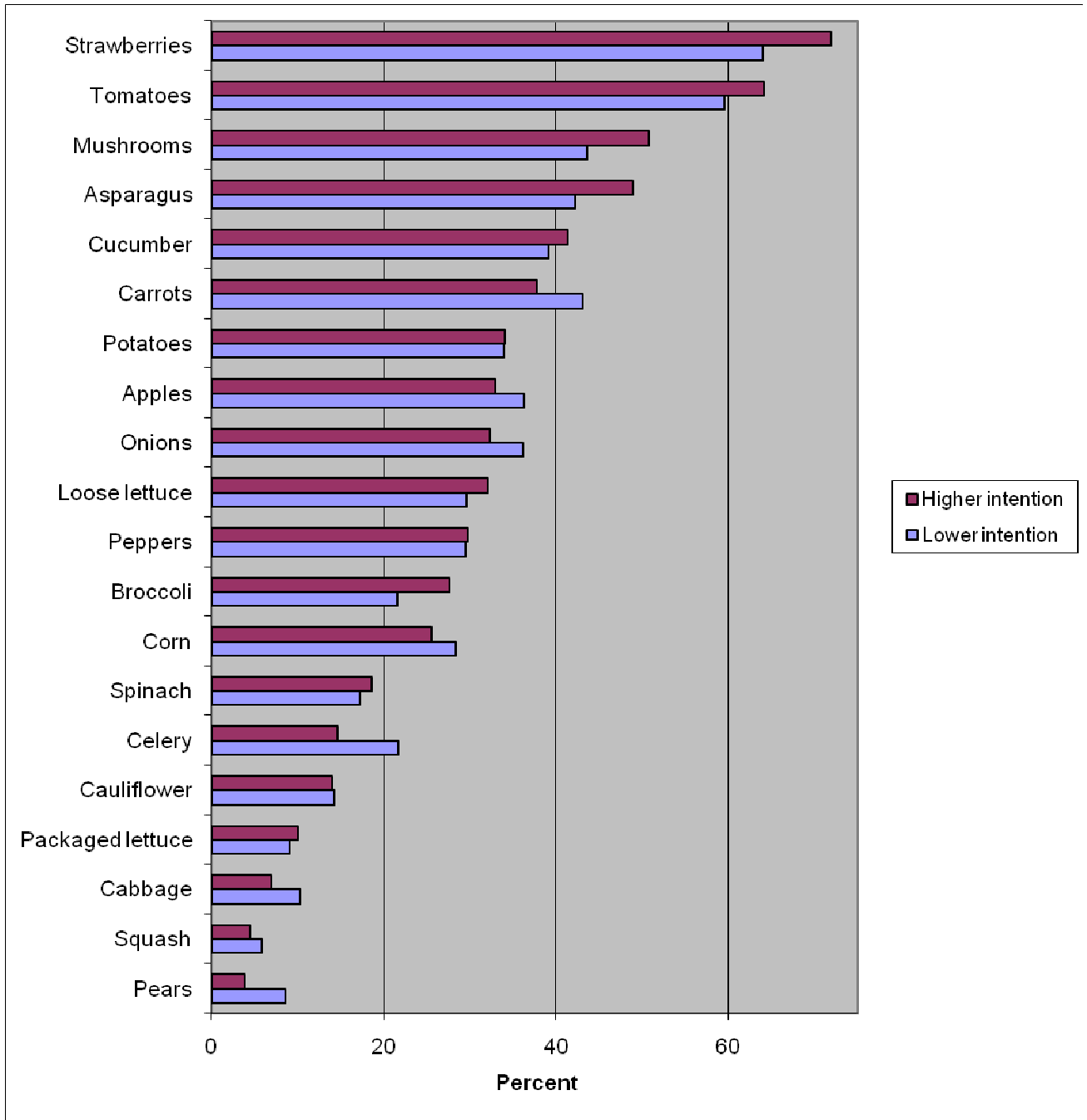


Figure 3. Proportion of consumers that purchased fresh produce grown in Ontario according to purchasing intentions:

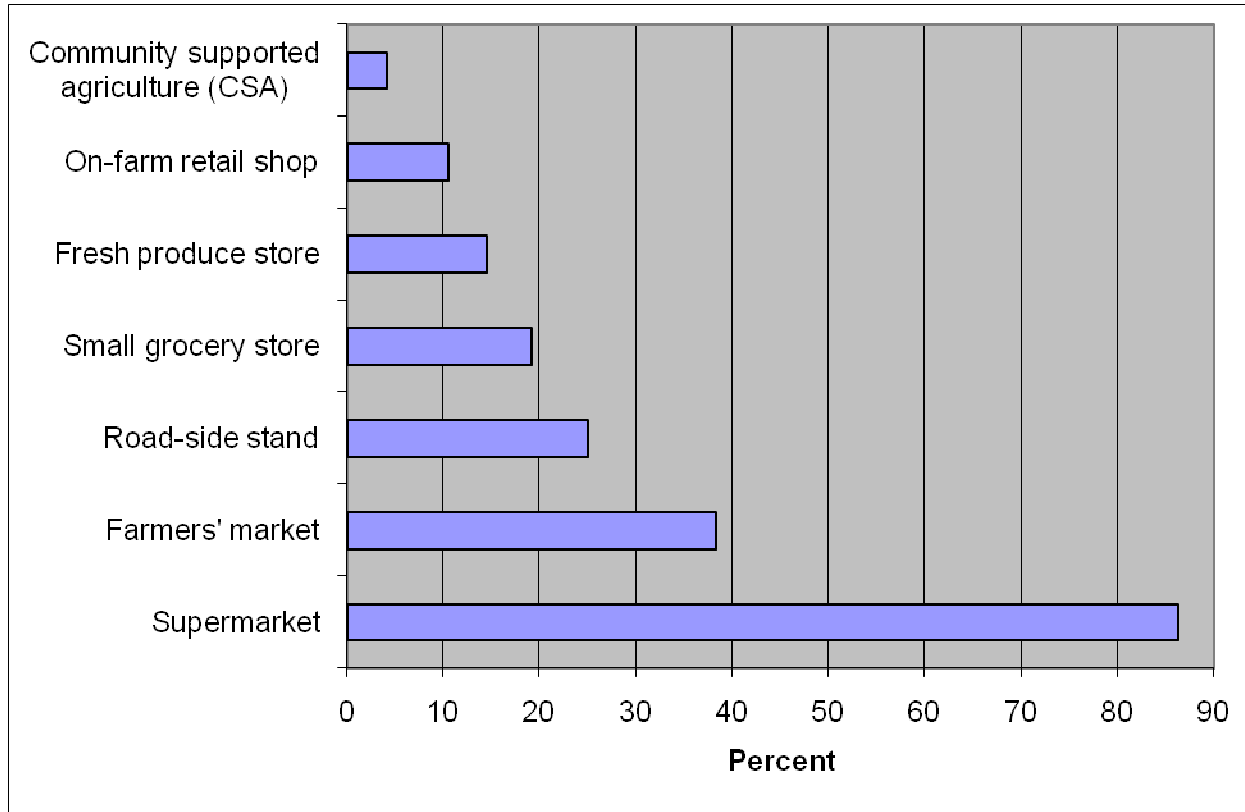


Source of fresh produce grown in Ontario

Around 86 percent of respondents reported that they had purchased fresh produce grown in Ontario in a supermarket over the last two weeks. Farmers' markets were the second most important source of fresh produce grown in Ontario, having been used by about 38 percent of respondents (Figure 4). Only a small proportion of respondents had purchased Ontario-grown fruit and vegetables through a Community Supported Agriculture (CSA) scheme (4.8%).

Although these results suggest that supermarkets are the main source of local-produced fresh fruit and vegetables, many consumers purchase from multiple sources. For instance, 32 percent of respondents reported purchasing Ontario-grown fruit and vegetables from two sources of supply, whilst around 30 percent reported having used three or more sources (Figure 5). At the same time, respondents using supermarkets to source locally-produced fruit and vegetables were less likely to also purchase from other outlets. Thus, while only 66 percent of respondents that purchased local-grown fresh produce in supermarkets also purchased from other sources of supply, more than 90 percent of consumers that did not use supermarkets purchased from multiple sources. This suggests a contrast between supermarket and non-supermarket shoppers in the sourcing of fresh fruit and vegetables.

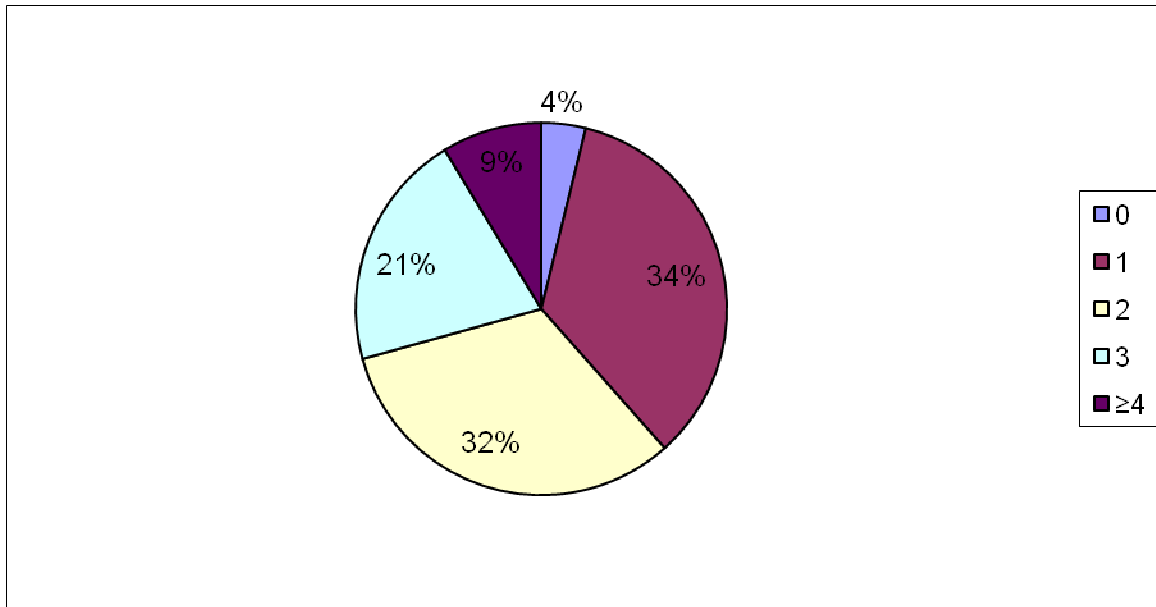
Figure 4. Source of purchase fresh produce grown in Ontario:



Conclusions:

Results from this third Guelph Food Panel survey show that the proportion of consumers that actually purchase fresh produce grown in Ontario varies by product. Moreover, for some products there is a considerable gap between the intention to purchase and real purchase behaviour. Supermarkets are the main source of fresh produce grown in Ontario, followed by farmers' markets and road-side stands. While consumers often purchase locally-produced fruit and vegetables from multiple sources, they are less likely to do so if purchasing in a supermarket.

Figure 5. Number of sources of fresh produce grown in Ontario used by consumers:



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