



Nuffield Canada
AGRICULTURAL SCHOLARSHIPS

**Opportunities to
Brand Commodities
that are Further
Processed into
Ingredients**

**Nicole Mackellar
November 2019**

NUFFIELD CANADA

Nuffield Canada Agricultural Scholarships

Nuffield Canada offers scholarships to agricultural leaders to expand their knowledge and network with top individuals around the world, to promote advancement and leadership in agriculture.

As part of the larger international Nuffield community which includes the United Kingdom, The Republic of Ireland, Australia, New Zealand, France, the Netherlands and Zimbabwe, scholarship recipients become a member of the over 1,500 strong Nuffield alumni which interact to aid the latest scholars and continue the development of past scholars.

Scholarships are available to anyone between the ages of 25 and 45 involved in agriculture in any capacity of primary production, industry or governance.

The scholarship provides individuals with the unique opportunity to:

1. Access the world's best in food and farming
2. Stand back from their day-to-day occupation and study a topic of real interest
3. Achieve personal development through travel and study
4. Deliver long-term benefits to Canadian farmers and growers, and to the industry as a whole

Applications are due annually by April 30th

SCHOLAR PROFILE



I currently live in Guelph, Ontario where I work as the Manager, Market Development for Grain Farmers of Ontario. Grain Farmers of Ontario is the largest commodity organization in the province of Ontario, working on behalf of the 28,000 farmers who grow barley, corn, oats, soybeans and wheat. The organization works to develop, defend, and promote an innovative and sustainable business environment which will allow farmer-members the opportunity for profitable growth.

I took an interesting route getting to the agriculture industry having worked in sports marketing for 5 years after university with Canada's only major league baseball team. My strong ties to the agriculture community brought me back and I have spent the last 7 years working for Grain Farmers of

Ontario in their Market Development Department now leading all activities and initiatives.

Agriculture has always been a part of me though having grown up on a beef and cash crop, now solely cash crop farm in Southwest Middlesex. My family still owns and operates the farm and I remain very active in its operations especially during the busy seeding and harvest months.

I had a strong interest in the Nuffield Canada Scholarship program for several years having observed my Manager go through the program in 2012. The knowledge he gained and the international connections he made were something that really grabbed my attention. Five years later, I applied and was very fortunate to be selected. Nuffield Canada presents several opportunities for both personal and professional growth. Personally, it was an opportunity to challenge myself and gain more information on a sector I am truly passionate about. I am also a person who always wants to learn and believe we will never reach an age where we cannot continue to learn and gain new knowledge. It was an opportunity to push myself out of my comfort zone. Professionally, it was an opportunity to further increase my knowledge and understanding of global agricultural markets which will help in my role of pushing the Ontario grain industry to be a world leader.

ACKNOWLEDGEMENTS

There are not enough ways to say thank you to all the amazing people and organizations that allowed me to have this incredible experience. I will forever be grateful to all of you for allowing me this opportunity.

First to my amazing life partner Craig, who without none of this would be possible. Thank you for your constant support, for pushing me to apply in the first place, for taking care of everything while I was away and for always being my cheerleader. I would not have been able to do this without you.

To my family who embraced this crazy idea I had with open minds and hearts. Thank you for your continuous support and encouragement.

To my Nuffield alumni who became my unofficial mentors in this journey.

Becky Parker, my Nuffield navigator. You have been by my side for this entire process answering any and all questions I had and helping guide me through everything.

Crosby Devitt, who introduced me to the Nuffield Canada program five years ago. If it were not for you sharing your incredible experience I would never have been given a chance to experience it myself.

Tony Balkwill, who helped set my mind at ease when I felt I wasn't doing enough or was going in the wrong direction.

Karen Daynard and Blake Vince, who helped me figure out exactly what it meant to be a Nuffield Scholar and how to share that with the rest of the world.

Shannon McArton our amazing Executive Director, who always made sure I had all the information I needed, reminded me of deadlines and answered my million questions.

Last but certainly not least I would like to formally thank and acknowledge Grain Farmers of Ontario for its sponsorship of my Nuffield Scholarship and for its continued support of Nuffield Canada.

EXECUTIVE SUMMARY

Everywhere you turn in the agriculture industry you hear about how consumers want more transparency regarding the food they eat. They want to know where it was grown, how it was grown, and if sustainable and ethical practices were followed. This is probably more so the case for us here in Ontario given our large urban population base. With over 45 million people living within a 500 KM radius of Toronto (Free Map Tools 2018), the Ontario agriculture sector is nestled against one of the largest population areas in all of North America.

This unique situation presents both a challenge and a tremendous opportunity for Ontario grain producers. Ontario grain is the largest agricultural commodity grown within the province - annually generating 12 million metric tonnes of barley, corn, oats, soybeans and wheat. It provides ingredients to many food products manufactured within the province and across the country. However, this is virtually unnoticeable to the consumer many of which today would not be able to identify products that are made with Ontario grain.

Recognizing the need for increased transparency by consumers, this report looks at the opportunity to brand commodities, like Ontario grain, that are further processed into ingredients. If brands can be developed, how can they be leveraged to help drive consumption of Ontario grain products and increase consumer demand, ultimately leading to more opportunities for Ontario grain producers?

This study looks at several examples, from around the world, of successful brands that have accomplished the goal of showcasing their products, telling their stories and ultimately increasing demand for their products.

The results of the study identify that there are opportunities to brand commodities that are further processed into ingredients. The best way to achieve this is to start with the development of a grain label. To be successful this needs to be done at a national level and not at a provincial or state level. To really connect with consumers, the label and accompanying brand campaign need to focus on more than just geographical location. It needs to tie into an additional element like sustainability to help drive it forward. To identify those elements that should be used in building a label and accompanying brand, consumer research needs to be conducted to identify the attributes consumers are looking for in grain and grain-based products. From here, a label can be developed that allows the consumer the opportunity to easily recognize Canadian grain-based products and help influence their purchasing decisions.

DISCLAIMER

This report has been prepared in good faith but is not intended to be a scientific study or an academic paper. It is a collection of my current thoughts and findings on discussions, research and visits undertaken during my Nuffield Farming Scholarship.

It illustrates my thought process and my quest for improvements to my knowledge base. It is not a manual with step-by-step instructions to implement procedures.

Neither The Nuffield Farming Scholarships Trust, nor my sponsor, nor any other sponsoring body guarantees or warrants the accuracy, reliability, completeness or currency of the information in this publication nor its usefulness in achieving any purpose.

Readers are responsible for assessing the relevance and accuracy of the content of this publication.

This publication is copyright. However, Nuffield Canada encourages wide dissemination of its research, providing the organisation is clearly acknowledged. For any enquiries concerning reproduction or acknowledgement contact Nuffield Canada or the report author.

Scholar Contact Details

Nicole Mackellar

100 Swift Crescent

Guelph, ON

N1E 7J1

Phone: 519-400-0667

Email: nicole.mackellar@gmail.com

In submitting this report, the Scholar has agreed to Nuffield Canada publishing this material in its edited form.

NUFFIELD CANADA Contact Details

Email: secretary@nuffield.ca

TABLE OF CONTENTS

SCHOLAR PROFILE	iii
ACKNOWLEDGEMENTS	iv
EXECUTIVE SUMMARY	v
TABLE OF CONTENTS	vii
1.0 INTRODUCTION	1
1.1 Canada’s Agriculture Landscape	1
1.2 Consumer Trends	1
1.3 Changing Consumer Demographics	2
1.4 Objectives of Study	2
1.4 Process of Study	2
2.0 BRAND EXAMPLES FROM AUSTRALIA	3
2.1 Pangkara Foods	4
2.2 McLaren Vale Grape, Wine & Tourism Association	5
2.3 King Island Beef	7
2.4 King Island Dairy	9
2.5 The Tasmania Honey Company	11
2.6 Huon Aquaculture	13
2.7 Willie Smiths	13
2.8 Little Big Dairy	15
2.9 MSM Milling	16
2.10 Buy West Eat Best	17
2.11 Food South Australia	18
2.12 True Aussie	18
2.13 Lessons Learned	19
3.0 BRAND EXAMPLES FROM THE UNITED KINGDOM	20
3.1 Waitrose	22
3.2 Stockan’s Oatcakes Ltd	23

3.3 Quality Meat Scotland	24
3.4 Blodyn Aur (Golden Flower).....	25
3.5 Livestock Marketing Ltd	26
3.6 Hybu Cig Cymru (Meat Promotion Wales).....	26
3.7 Linking Environment and Agriculture (LEAF)	27
3.8 Red Tractor.....	28
3.9 Lessons Learned	31
4.0 BRAND EXAMPLES FROM CANADA	32
4.1 Lessons Learned	33
5.0 CONCLUSIONS	34
6.0 RECOMMENDATIONS	36
7.0 GLOSSARY	38
8.0 REFERENCES	39

1.0 INTRODUCTION

1.1 Canada's Agriculture Landscape

In Canada, we are very fortunate to live in a country with a vast agriculture sector. From the wheat fields in the prairies to the potato fields on Prince Edward Island, Canada produces a wide variety of agriculture goods that help contribute to the country's overall economy. Specifically, in Ontario the grain sector contributes \$9 billion in economic output, \$2.5 billion in farm gate receipts and helps to generate 40,000 jobs (Grain Farmers of Ontario 2018). It runs neck and neck with the auto manufacturing industry for being the largest economic driver of the province.

Ontario is the most populated province within the country with over 38% of Canada's population living within its boundaries (Statistics Canada 2018). This can create immense opportunities but can also cause significant challenges. There are over 6 million acres of grain producing farm land producing 12 million metric tonnes of grain within the province (Ontario Ministry of Agriculture, Food and Rural Affairs 2018). Often this land is found nestled between urban dwellings. As populations continue to increase, more and more pressure will be put on Ontario farmers to produce more with less. This situation also presents an opportunity to connect with consumers and help provide information on how and where their food is produced. Many Canadians including Ontarians have very little information on how or where their food is produced.

1.2 Consumer Trends

All trends point toward consumer appetites wanting to support local. According to the Business Development Bank of Canada, 45% of consumers made an effort to buy Canadian products in the past year, 97% buy local to support the local economy and 87% of consumers think it is better for the environment (Business Development Bank of Canada 2013). If you look at consumer research over the past three to five years, it confirms this thought with the increased presence of "buy local", "source local", or "support local" as top trends. In a 2017 Restaurant Industry Forecast report, the National Restaurant Association ranked sourcing local as one of their top five trends (National Restaurants Association 2017). The challenge is that when many people think of local they think of fruits, vegetables and meat, commodities that are easily identified by consumers as they can see them directly on their plates. Many consumers do not recognize that they are probably consuming more local products than they think. For grain products, which are not as easy to identify for consumers, an additional logo or recognition is needed for consumers to connect that they too are local products.

1.3 Changing Consumer Demographics

We have seen a change in consumer behaviour that is a direct reflection of our changing demographics. Over the past ten years, we have seen the rise of the “Millennial” which is defined as someone born between the years of 1982 and 2000 (Howe and Strauss 2000). This new demographic sector is very different from any sector we have seen before. They are technologically savvy, well-educated with a passion to learn and expect transparency (CBC News 2015). They are very interested and passionate about food and are leading the change in the food revolution. From casual to fine dining to farm-to-table, millennials are not afraid to try something new. Now making up much of the workforce, millennials have the power to create real change and push trends forward (Forbes 2017). They are also brand loyalists. According to a study done by Yes Lifecycle Marketing, millennials demonstrate the most brand loyalty out of all the generations. The study also suggests that if brands keep their promises, millennials are the most likely to be open to their marketing messages (Yes Lifecycle Marketing 2018).

1.4 Objectives of Study

Knowing what we know about our vast agriculture sector, the move toward supporting local in consumer trends and the change in consumer demographics, there presents a large opportunity for the agriculture sector. While it seems that the gap between rural and urban grows wider and wider each day, as an agriculture community we have the opportunity to connect with this demographic like never before.

The objective of this study was twofold. The first objective was to research and identify if it is possible to brand commodities that are further processed into ingredients. Are there other jurisdictions out there already doing the same thing and what can we learn from them?

The second objective was to determine, if a brand can be successfully developed, how can this be leveraged to help drive utilization of Ontario grain and drive consumer demand for Ontario grain products.

This is a very complex area as consumers are already inundated with labels. Whether it be organic, gluten-free or non-gmo, the consumer is already overwhelmed with labelling on packages. This study looked to identify not only if a brand could be established, but how this can translate into a label that would not get lost in the masses and would resonate with consumers to help drive the purchase of Ontario grain-based products.

While the project focuses on Ontario, the goal was to determine strategies that could be applied across all Canadian agriculture and across all commodities.

1.4 Process of Study

To achieve the two objectives of this study as outlined above, I travelled to many different countries including Australia, England, Scotland and Wales to meet with organizations, private

companies, producer organizations, farmers and government agencies. These meetings provided unique perspectives on branding, and how they could potentially be applied to commodities that are further processed into ingredients. I had the opportunity to meet with large national campaigns as well as those that were more regionally specific. Each provided key insight into opportunities that may be available in Ontario and Canada. The next section of the report is a highlight of the discussions held and the key takeaways.

2.0 BRAND EXAMPLES FROM AUSTRALIA

When people think of Australia they do not automatically think of food. Known for its amazing coastlines and wine, Australia has spent several years working to transform its food scene. With over 55 million acres of grain crop planted each year, it is a significant agriculture powerhouse serving not only their domestic market but several international markets as well (Australian Export Grains Innovation Centre 2016). Like many Western developed societies, there is a growing urban population in Australia with many young people moving from the rural regions to the more developed, hi-tech cities. What comes with this is a desire by residents to have a better connection with their food. While they may have moved from the rural food producing regions, they still have strong ties to wanting to support local. This was seen through numerous discussions with those living in the major metropolitan regions of Australia. Although many are far removed from the farm, they have a strong desire to know where their food comes from and to support those that are growing it. As a result, more and more demands are being put on the food sector to better identify how food products are made and the ingredients that go into them. Using their tremendously successful case study of brand development in the wine industry, the food sector has done a great job of developing branding and promotional campaigns to help educate consumers on domestic, Australian food products.

Whether it be country-run programs like the “Made in Australia” kangaroo label that allows consumers to understand what percentage of the product was made from Australian ingredients or State-run branding programs like “Buy West, Eat Best” that promote Perth specific products, or company specific provenance branding schemes, there is increased emphasis on local promotion.

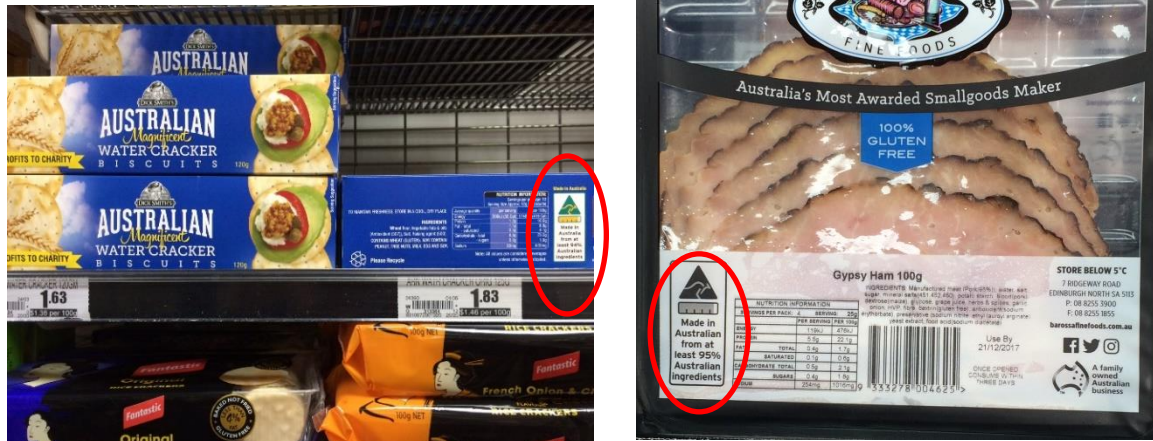


Figure 1. Pictures of “Made in Australia” labelling seen in grocery stores in Southern Australia

Food manufacturing in South Australia is different from that of the rest of the country. With mostly small and medium sized businesses and very few large multi-nationals, many companies are boutique in style, offering premium based products. As a result, there is greater attention put on the provenance of food. South Australia has also created a unique identity for itself that has allowed it to transform into one of Australia’s biggest food hubs.

With restrictions on the use of biotechnology within the state, the only state in Australia to do so, it creates an instant distinguishing feature for South Australian food products from the rest of the country.

2.1 Pangkara Foods

Located in the Clare Valley, a region in the north part of the State of South Australia, Pangkara Foods was created in 2011. As a 5th generation family farm growing cereals, legumes and hay, the business was created to produce value-added products for the farm and to help bring in an additional revenue stream. The company produces 15 products in total including pulses, pastas, gluten free pasta, lavosh and flour that are sold in every state across the country.

To distinguish themselves from other companies, Pangkara Foods focuses on connecting the consumer to where the product was grown, the family farm. The branding on each package includes “Grown by Australian Farmers” along with “Clare Valley”, the exact region where their farm is located.

The story behind the Pangkara brand is that of the family farm and the commitment that the farm makes to produce the highest quality products. This, along with the non-gmo and gluten free branding (not available on all packaging), has allowed them to have tremendous success with the middle-class, higher-income consumers. This audience was targeted as they have a

keen interest in food provenance and are willing to pay more for premium based offerings. Although very small in nature, the company has been able to remain competitive against large multi-national companies due to its unique story and their brand connection to it. The family recognized early on that they would need to create something that consumers had not seen before. While the products they are producing can be found in many Australian grocery stores, it is the distinct attributes they have created and are committed to that has allowed them to stand out. From the name of the company with its direct connection to the people of the land, to the story of the family farm, to the use of whole grain flour, they have found the attributes consumers are looking for and have built their brand around it. This is what has allowed them to have the success they have seen to date.



Figure 2. Pangkara Food Products from Clare Valley, South Australia

2.2 McLaren Vale Grape, Wine & Tourism Association

Developed ten years ago, the McLaren Vale Grape, Wine & Tourism Association (MVGWTA) represents more than 500 businesses and associations in the area including: 150 wineries, 257 grape growers, 30 industry partners, 50 tourism operators and 20 associated businesses (McLaren Vale Grape, Wine & Tourism Association 2018). The association works to grow value and equity in the McLaren Vale brand while developing domestic and international market opportunities.

The association focuses on three strategic areas:

1. Marketing/ Profiling – developing new market opportunities by profiling all three industries in both domestic and international markets;

2. Industry Development – supporting members to produce premium products, exceptional visitor experiences and valuable relationships helping to push the McLaren Vale brand to be viewed as a premium region and destination; and
3. Advocacy & Lobbying – working with all three levels of government (local, state and federal) to ensure members can continue to have financial sustainability.

MVGWTA works on several activities to help promote the McLaren Vale brand and its products. One way in which they do this is through an ambassador program. Ambassadors represent the various sectors throughout the McLaren Vale and work to promote the premium products and tourism offerings the region has. The ambassadors sign a Memorandum of Understanding and commit to be an ambassador for two years. Throughout this time, they will attend events, government functions and industry trade shows speaking about the importance of the MVGWTA and what their members have to offer. Through the ambassadors the McLaren Vale region and brand have grown throughout the world. Speaking with Jennifer Lynch, General Manager of MVGWTA, their ambassador program has been one of the most successful initiatives they have undertaken as it allows a third party to help tell their story which has helped resonate better with consumers. This is something that Ontario and the rest of Canada could really benefit from. While there are many organizations that are working on telling the story of Ontario agriculture they can run into the problem of being considered “biased” because they are an organization working on behalf of the agriculture industry. Having third party ambassadors help tell your story, allows for independent voices to share your messaging. It would be important for Ontario to have ambassadors that come from a wide spectrum, including millennials, moms and high-income earners. Each would allow the opportunity to share the incredible stories of Ontario agriculture in their own way. It will also be critical to take a sector wide approach on this. While each commodity, be it grains, livestock, horticulture, viticulture etc., will have their own key messages to be shared, it is important we take a collaborative approach to this to provide consistent messaging across the province. This may be something to look at from a national perspective as well allowing the opportunity to share the story of Canadian agriculture.

The MVGWTA also oversees all branding components of the use of the McLaren Vale brand on products. For a product to brand itself as McLaren Vale, 85% of the product must come from the region, they must be a registered member of the MVGWTA and pay a levy into the organization. All wine that is exported from the region using the brand is tested by the government to ensure it is using fruit from the region and the grapes represent the kind of wine best known to the region, Shiraz. According to Lynch, having these parameters in place are critical to keeping the authenticity of the brand. When consumers see the McLaren Vale brand they are assured that it is, in fact, from grapes grown in the region (Lynch 2017).

In looking to develop a potential grain label or grain brand in Ontario it will be very important to ensure the proper parameters are in place to allow integrity to be brought to the brand. If it is seen that anyone can use the brand it will be hard to build the integrity and credibility that is needed for a brand to be successful. Having parameters ensures that when consumers see that brand they know they can trust what it stands for.

2.3 King Island Beef

There are two iconic brands that are well known to King Island. The first is King Island Beef and the second is King Island Dairy.

Created in the 1980's by a group of beef farmers looking to create more value-added opportunities, King Island Beef has gone through a tremendous amount of change over the years. It started as a way for farmers to share the story of the natural beauty of the island which provided an environmentally sustainable location to raise livestock. With many of their paddocks (pastures) nestled right along the coastline, the island provides a natural setting for grass-fed, antibiotic-free products, which allowed them to distinguish themselves from their mainland competitors. King Island Beef was also one of the very first locations that implemented, and was very successful with, Meat Standards Australia quality assurance program. The program assures consumers that specific practices are followed regarding animal welfare and traceability and that quality parameters are put in place.



Figure 3. Cattle grazing in King Island, Australia – behind the hills is the ocean.

In the 1990's after having worked on putting together their story and really promoting King Island Beef as a unique premium product, a partnership was created with SPA Foods, who at the time was one of the leading grocery retailers in the country. Starting with a trial run, the beef was sold under its iconic brand in several Melbourne stores. The beef was a tremendous success creating a significant amount of demand for the product. SPA Foods even started to export the meat to Japan who loved the product and the story that came with it. Many restaurants in Japan started running promotions advertising their meat was supplied from King Island.

SPA Foods was sold to Tasmania Food Services who had a more domestic focus. Building off the success that SPA Foods had in Melbourne, Tasmania Food Services started offering the beef in their butcher shops.

Recognizing the success that King Island Beef was having, Coles, one of Australia's largest grocery retailers, became very interested in the products, and by the 1990's, was selling it at their own locations. Seeing the growth potential and the interest by consumers, Coles decided to come out with their own Black Label brand to compete with King Island Beef. The products had very little success however, as they did not have the unique story and selling features that King Island Beef had to offer.

One of the main factors that helped the island develop its brand was the vertical integration they were able to offer. Having a local abattoir on the island meant they could have full control over the entire process from raising the animals to processing and packaging. For King Island Beef, without vertical integration, their business model did not work. Having to wait for the unpredictability of offshore ships to process their animals resulted in delays of product getting to consumers. Persuaded by extravagant offers from offshore abattoirs, many of the islands farmers started shipping their beef to be processed in Tasmania. This drove down demand for the local abattoir, and in 2012, it was forced to close its doors. With all beef now having to be processed offshore, it took away from the overall brand and the story that had been originally created.

Recognizing the situation they were in, the island's beef farmers once again came together and formed the King Island Beef Producers Group. The vision of the group is to ensure the King Island brand has the best brand image of all red meat products in Australia, and that the products gain a reputation for excellence throughout the world (King Island Tourism 2011). Understanding they could not manage the responsibility of raising the livestock as well as marketing it, the King Island Beef Producers Group engaged with the EAT Group, an Australian agriculture development firm, who worked with investors to bring back a local abattoir to the island. They have also worked on building the brand back up with consumers to be the premium marquee product that it is.



Figure 4. Transformation of King Island Beef Logo

There are many key lessons that Ontario can learn from the experiences of King Island Beef. While we do not have the unique features of being an island, we do have many attributes that make us stand out. From being surrounded by 1/5th of the world’s fresh water to having over 70 million hectares of forests (Ministry of Natural Resources 2016), Ontario has many unique selling features. It will be important to stay true to these unique attributes while building the brand. This will be what makes it stand out against the numerous other food related brands in the market place. Staying true to what you are, and what you have to offer, will help bring credibility, integrity and ultimately loyalty to an Ontario grain brand.

2.4 King Island Dairy

Started in 1902 as a cooperative with local farmers, King Island Dairy has become a recognizable brand around all of Australia and parts of the world.

Creating premium cheeses, the company has struggled to identify itself as a premium product with its consumer base. Hand-crafted from milk from ten local farms, the milk is picked up three times a day and never sits in holding tanks for more than two hours. This is a completely unique feature that separates King Island Dairy from all the other major cheese producers in the country.

Originally owned by Dairy Farmers, Australia’s second largest fresh dairy company, the company was sold to National Foods in 2008. After taking over the company, National Foods tried to move away from being a premium cheese product to be a straight-forward everyday cheese product more suitable for supermarkets. The company was unsuccessful though due to the high input costs associated with manufacturing on an island.

In 2009, the company’s ownership changed to Lion Nathan National Foods, when Kirin Holdings Company Limited purchased Lion Nathan and merged with National Foods. They are now the second largest food company in Australia.

Operating under a subsidiary of the parent company, King Island Dairy now goes under the umbrella “Lions Drink & Cheese”. Recognizing the premium product that was being produced

due to its location and quality of milk, Lions Drink & Cheese devoted resources to building the brand back up.

Even with this commitment from the parent company, King Island Dairy still struggles with how to capture value opportunities that are generated through its unique location, its handmade manufacturing and its connection to local farmers. Recently they have renovated their cheese shop to make it more of an experience for customers and to help better tell their story.

Included in the renovations was the creation of a tasting room that allows consumers to taste all their products while learning the history of the company.

The company has also started to develop social media platforms to extend its reach beyond just those that walk through the cheese shop doors.

The company recently did a consumer survey to gain a better perspective of what consumers thought of their brand. While consumers identified that they knew of the brand, they did not associate it with being a premium product. This is in large part due to the fact that the cheese is available in everyday supermarkets along with fancier delis and higher end shops. When consumers were told of the story of King Island and its uniqueness, they were very interested and intrigued. There was some skepticism however about whether King Island produced cheese directly on the island from local milk sources. This was part of the motivation for the development of the cheese shop to encourage visitors to come to the island and see firsthand their operations.

While the company had previously produced pure creams and yogurts, they have moved backed to producing solely cheese due to the volatility of raw ingredients. It was also a way to build their brand story, further distinguishing themselves from their competitors as only being a premium cheese manufacturer.

Like King Island Beef, King Island Dairy has a unique brand and story to tell. Unlike their cohorts however, they have not been successful in leveraging this to promote their products, falling into the same mainstream category as everyday cheese brands. Through the renovations of their cheese shop and the development of social media campaigns, King Island Dairy is working to build up its brand and the story behind it of being a premium based cheese product. This will take some time however and King Island Dairy must be committed to this in order to be successful.

This is something the Ontario grain industry will need to decide when looking to build its brand. Are we looking to a create brand that will help promote premium based products or are we looking to create a brand that will help promote the everyday consumer product? I believe it should be the latter. Ontario competes in the commodity world, while we have been tremendously successful in building premium markets for food grade soybeans, most of our grains are sold on the commodity market. Knowing this, what are the unique selling features we have to offer that can allow us to stand out from our competitors? What is it that consumers are looking for when it comes to grain-based products? Like King Island Dairy, it will

be important for Ontario to conduct consumer research to gain a better perspective on the thoughts and opinions of Ontario grain. Based on the findings from the research, the brand can be developed/focused around the areas that are top of mind to consumers.



Figure 5. King Island Dairy Cheese Tasting Room and Products

2.5 The Tasmanian Honey Company

The Tasmanian Honey Company began in 1978 as the concept of Julian Wolfhagen, a beekeeper with a profound passion for Tasmania, its wild forests and the honey that they produce.

The company produces a wide range of wild honeys that come from across Tasmania, each with its own unique flavour. These flavours are generated through the rotation of bee hives across the state which allows for pollination to occur with several different trees and flowers, producing the unique flavours you find within their products. This also helps to ensure that honey production will remain year-round.

Their most popular flavour, and what they are famous for, is Leatherwood honey. The product is unique to any other honey produced in the country, in that it comes from the nectar of trees that take 75 years to grow. To preserve these trees, and ultimately their business, the company works on several conservation initiatives that help with the overall health and preservation of the trees.

The company also uses very low temperatures when processing the honey which provides another unique selling feature and helps to distinguish itself in the market place.

Knowing that they were producing a very high end, premium based product, company founder, Julian Wolfhagen, knew the honey could not go in any ordinary container. It needed something

that showed profound respect towards the honey and would allow for the product to sell itself (Wolfhagen 2017). In 1990, using his passion for art and design, Julian created beautiful art pieces for each tin that reflected the old-world charm of the product, along with highlighting the natural beauty of the regions in which the honey is produced. Each flavour of honey has its own unique design allowing for consumers to be able to easily distinguish the different product offerings. The tins have become iconic pieces and are known around the world. Many customers keep and use the containers as decorative pieces. This helps to keep the company’s branding going long after the honey is gone.

It is interesting to see how the Tasmania Honey Company has been able to take a product as simple as honey and turn it into this premium product offering recognized around the world. Like several of the other companies I met with, The Tasmania Honey Company recognized that producing the honey in the unique way that they do was not enough, they needed something else to draw consumers in. What really transformed the company and their products was the development of their art deco containers. Unlike anything else in the market, their containers have turned ordinary honey products into works of art allowing them to tell their own story. The question for Ontario is how we can do this with commodities that are as simple as grain. How are we going to get an Ontario grain brand to tell our story?



Figure 6. Leatherwood Honey Tins from The Tasmania Honey Company

2.6 Huon Aquaculture

Founded in 1986, Huon Aquaculture has grown to become the second largest salmon producer in the state of Tasmania. Producing 17,000 tonnes of fresh salmon per year, it has become a globally recognized premium brand of fresh and smoked salmon products (Huon Aquaculture 2018).

The company was created by husband and wife team, Peter and Frances Bender, as a diversification to their family cattle and sheep farming business. Little did they know, it would grow into a highly successful commercial business.

The company has not always been globally recognized as being a premium product. It was the work of Nuffield Scholar Abbey Mckibben, Brand Manager, that really helped turn things around. For many years Huon sold strictly on the commodity market, with no specific branding to their company or to their story. In 2002 when Abbey joined the company, Huon had been selling under their own brand for three years, however they were not seeing the results they were hoping for. Through her research studying provenance branding, Abbey was able to generate a new marketing plan that would help lead Huon to where they are today, a leader in premium based salmon products. Part of the plan was a change in the company's name from Huon Valley to Huon Aquaculture. The change allowed for a better connection to what the company was all about. Abbey also worked on diversifying product offerings, and creating demand for niche products in high end markets.

Today 70% of their salmon is still sold through wholesale with most still going unbranded as it is going into restaurants. A shift for the company was the increase of branded products being sold in grocery stores. Now close to 25% of the product is sold via this channel which has helped to increase brand awareness for the company (Mckibben 2017).

They have also created Reserve Salmon which is their highest premium product offering. Most sales of these products happen online and in high end boutique shops.

For Huon, the company had to move away from focusing solely on its location as part of its brand. It needed to incorporate more of what it was about, including its commitment to sustainable farming practices and community initiatives, to truly connect with the consumer and to have their products seen as more than just a wholesale commodity.

2.7 Willie Smiths

Willie Smiths has been a staple apple producing company in Tasmania since 1888. A family-based company still owned and operated by the Smith family, it has evolved to become one of the most iconic brands in Tasmania.

Tasmania has always had a thriving apple producing industry, and in the 1960's, was the largest apple growing region in South Australia. Over the past 30 years, this has dramatically shifted

going from 1,000 growers to only 14. This has been due to emerging competition from Chile and China, who can produce at costs significantly lower than Tasmania.

Andrew Smith, the fourth generation on the orchard, saw that the family business needed to make a dramatic turn, or it would risk ending up like many of their competitors, out of business and searching for new opportunities. After having travelled the world extensively researching what other countries were doing, Andrew made the decision to turn the orchard to organic production. After some strong persuasion to his father, the orchard went organic in 1997. The main reason for going organic was to provide a point of differentiation from its competitors. They saw it as a way to try and raise the price of a low-price commodity being sold in a commodity market.

In addition to going organic, the family business started to produce apple juice to create value added products. Not having the success they were hoping, the family started researching other ways they could bring back value to the business, and in 2009, opened Australia's first organic cider facility. In addition to creating added-value, cider manufacturing also provided a way in which to further reduce risk on the farm by creating another avenue for the apples to go in while also creating an additional revenue stream.

All branding associated with the cider ties back to the founder of the business, Willie Smith. The lettering of the brand and logo is the same that was used back in the 20's and 30's on the apple barrels. It is also the same lettering that is on the grave of Willie Smith, founder of the company. Part of their brand is also the map of Tasmania to showcase their geographical provenance.

When the cider house was first opened, it was about building the brand of "Willie Smith's Organic Apple Cider" and not about profit. They knew, that by growing the brand, profit would follow.

To build their brand, they knew they needed to connect with consumers. One way in which they have done this is by using QR codes which allows consumers the opportunity to learn more about the business and the people behind it. They also host several events including festivals and live music allowing consumers to get a firsthand look at the business and the people behind it.

While the orchard has become mechanized using automatic pickers and robotics, the apples used for the cider are still handpicked adding to their story and providing another distinguishing feature to stand out against their competition.

The use of QR codes is an interesting mechanism to get further information to your consumer. As they are enjoying your product, they can be reading more about your company and brand and what they stand for. This could fit very nicely into an Ontario grain label and an Ontario grain brand. While it is hard to capture everything you are about in a simple label, by providing QR codes, the consumer is able to gain more information about Ontario grain production and the grain that went into the product they are purchasing. As part of the QR code, you could also

include pictures of the farmers who have grown the grain, making that direct connection back to the farm.



Figure 7. Iconic writing of Willie Smith's Cider House

2.8 Little Big Dairy

Like many family-based companies in Australia, Little Big Dairy Co. was created to help with vertical integration on the family's dairy farm.

Operating in an open market, the family wanted to help create value-add for their milk and help raise the price that was being paid. Through this, the Little Big Dairy Co. was created providing single source milk to the consumers of New South Wales.

To further distinguish themselves from the large milk producers within the country, Little Big Dairy Co. became the first dairy processor in Australia to be certified as a fair trade flavoured milk producer.

All the feed for their herd of 800 Holsteins comes from within 200 km's of the farms location. All ingredients used to flavour the milk are from fair trade sources which they use to make their own flavours to ensure no preservatives or chemicals are used.

To help create their brand the story behind it, they partnered with an Australian marketing agency. All the graphics used on their milk bottles are representative of the natural landscape that is found around the farm, including trees, flowers and the famous Macquarie River.

While the business has a website, they drive most of their consumer interaction through social media. While they do not allow farm visits for safety reasons, they use their several social media platforms to help tell the story of the farm through pictures and videos. The family is also looking to develop a small education centre on the farm that would allow visitors to see firsthand how the milk is produced. Through this, they are hoping to work with schools and universities on helping to educate children on milk production.

While most consumers do not have the opportunity to visit an Ontario grain farm directly, the use of social media can bring the farm to them. Through videos, pictures and interviews with farmers, you can create a virtual experience that allows that consumer to feel connected to the farm and the people growing the ingredients going into food products. This could also be a great tie in to the QR codes seen with Willie Smith's. It will be important for the development of an Ontario grain label and an Ontario grain brand to incorporate this personal aspect, allowing the consumer to feel they have a direct connection to the farm.

2.9 MSM Milling

Nestled in the small town of Manildra, New South Wales, MSM milling is producing some of Australia's highest quality oils including canola, sunflower, cotton and corn.

Created by farmers in 1993, the company was developed to provide value added opportunities to the farmers in the Orange district of New South Wales. In 2007, the company moved to Manildra to help improve logistics.

Recognizing the need to create something that would allow them to distinguish themselves from their competitors, the two founding farmers built a plant for the processing of non-gmo canola using an expeller press. Knowing that processing non-gmo ingredients was not enough, the farmers included themselves as part of their brand, allowing consumers to see firsthand who was producing the product. Using the story of the farmer allows MSM Milling to have a unique marketing strategy not seen by their competitors. This has also opened access to markets that otherwise would be quite difficult to obtain, including food service and bulk retail previously dominated by multi-national corporations.

The company brands its canola oil under the label, "Auzure", which means Australian pure. This ties into the geographical location of where the oil is produced as well as to the processing method that does not involve the use of any chemicals.

The company has built significant demand in the export market, particularly in Asian countries that have connected well with the brand and the farmers behind it. In speaking with Genya Miller, Communications Manager at MSM Milling, she indicates the main reason for this is the direct connection to the farmers that are producing the product. They like knowing who is behind the products they are purchasing (Miller 2017).

The company also puts a significant effort on sustainability and highlights this throughout all their branding, which is another distinguishing feature that adds to their overall story and brand.

2.10 Buy West Eat Best

The consumers of Perth were so fed up with the confusion around what products were made with local ingredients, they petitioned the government to develop a marketing program that would allow easy identifiers on what products were local to the region or produced with local ingredients.

From this, the Buy West Eat Best organization was created. Today, the campaign has over 150 members from across several different food sectors. The goal of the organization was to create a brand that could be used by companies that would help drive sales for Perth-produced products. For fresh products (fruit, vegetables, meat, seafood) they must be grown, fished or farmed in Western Australia. For processed foods (sauces, yogurts), the main ingredient must be grown, fished or farmed in Western Australia, and the finished product must be manufactured in Western Australia. Restaurants that commit to using a minimum of 70% locally fished, farmed or grown items on their menu are also eligible to use the brand (Birch 2017).

The organization is backed by several large grocery retailers who help to promote the brand by providing dedicated shelf space in stores for Perth grown/produced products. This has helped increase membership for companies who distribute to regions outside of Western Australia where the brand would have no significant value.

The organization and brand are connecting well with consumers with 85% of survey respondents indicating that they are influenced to purchase more local products when they see the logo (Birch 2017).

The organization has faced challenges though, in that there are many regions within Perth, and each one wants to be identified through Buy West Eat Best's marketing initiatives. Balancing the needs, wants and desires of each region can be challenging, and has led to duplication of messaging in some areas.

To provide true value to its members, Buy West Eat Best needs to expand to offer more services. While the brand and logo bring a great deal of value to members, for some this is not enough. In addition to the logo, offering marketing services and brand consulting would allow the program to expand further. It would allow the opportunity to work with companies who do not have their own internal resources in these areas, but are interested in the program. By offering these services Buy West Eat Best could expand its membership by working with these companies on how to incorporate the logo into their already existing marketing strategy.

2.11 Food South Australia

Food South Australia was established in 2010, through the merger of Food Adelaide and Flavour South Australia. It is an independent, industry-led, membership-based organization that represents food and beverage manufacturing companies in South Australia. It is the only independent food and beverage organization in all of Australia.

The organization manages several initiatives including funding programs for industry, a major awards program, as well as the EAT Local South Australia program.

The EAT Local South Australia program was created to help consumers easily identify food establishments that are serving local food. To be eligible, at least one main dish must have the main or naming ingredient sourced locally. In metropolitan Adelaide, the requirement is two dishes. The program is also available to food retail venues (wineries, farm gate retail) where at least ten different South Australian products must be showcased.

In addition to the logo, the organization has also developed an app that allows consumers to easily identify which food establishments are supporting local food products.

Unlike the Buy West Eat Best program in Perth, Food South Australia works to promote South Australian products in both domestic and export markets. With offices located in Japan and China, staff work to build demand for products by showcasing them at trade show events and initiating trade missions.

The one area where Food South Australia will need to consider doing additional work, is verification and compliance. To date, calls and follow-up meetings are held with companies, but there is no auditing system in place to ensure establishments are doing what they say they are. Without a more detailed auditing process, the EAT Local South Australia program runs the risk of having foreign- products making claims under the brand and driving down the integrity and credibility of the program.

2.12 True Aussie

With increased competition from around the world, and pressure to produce at a lower cost, the Australian government launched a new initiative that would showcase Australian beef, lamb and goats as a premium product.

Launched in 2014, True Aussie, administered by Meat and Livestock Australia (MLA), showcased to the world, the value-add products Australia red meat had to offer. The program was also a way to bring all previous marketing initiatives under the same brand to provide more consistent messaging. The program is built off three main pillars in which all marketing materials are tied into:

- Provenance: Australia is an ideal place to grow and produce red meat due to its climate, biodiversity and traceability;
- Trust: Australia is a trusted partner with integrity throughout the value-chain; and

- **Enjoyment:** Every consumer should enjoy eating Australian red meat.

Due to the large number of markets that Australian red meat is exported to, and the attributes each market is looking for, the program was built to be very flexible. Operating under the overall umbrella of True Aussie and its three main pillars, the program allows the opportunity for it to be customized, based on the needs of the market. In the US, where grass-fed beef is of importance, the program will put more emphasis on their grass-fed programs. In China, where trust and assurance of the brand is important, the program highlights traceability and auditing. The ability to have this flexibility is a critical component of True Aussie and is something that was lacking in their previous efforts.

In addition to MLA using the program and brand to help promote Australian products, companies themselves can use the logo on packaging if they meet the strict requirements. This is very complicated to administer though, to ensure that the products meet the integrity of the brand. Audits are performed with companies, but this has proven to be a large challenge for MLA due to limited resources, and as a result most of the compliance falls to the companies themselves. There is risk associated with this, in not having third party assurance which allows consumers to be able to trust in the brand and to know the products are genuinely Australian. For the program to continue to be successful, this is an area that MLA will need to investigate further and put more resources towards.

2.13 Lessons Learned

Canada and Australia are similar in many ways. Both countries have significant land masses, similar population densities, strong agriculture sectors, and are well liked by many nations around the world. We also face similar challenges regarding consumer demands around food production. Australian consumers want to buy or source local products (Impos 2017). The challenge they face is that for consumers, it is not always easy to identify what is local. Many programs have been developed as a direct result of consumer demand seeking clarification of what is local and what is not. This is evident with the emergence of the Buy West Eat Best program in Perth and the Food South Australia program in South Australia. It can also be seen in company specific branding, as was seen with Pangkara Foods.

One of the biggest lessons I learned through my studies in Australia is that to be successful with a brand you need to identify what defines you, and what makes you unique from everyone else. While this seems like a very simple marketing strategy and one that every company tries to employ, it can be quite difficult. Building off the strong consumer demand for wanting to source local, many of the companies I met with used their region as their distinguishing factor. King Island Dairy and King Island Beef are the best examples of this. Using their unique location of being on an island, both companies are trying to build their brands to share their story. However, being on an island is also hurting both companies because their consumers do not

feel that direct connection back to the origin of the product. With high costs associated with getting to the island, it is hard for consumers to see their operations first hand. King Island Dairy is trying to overcome this by bringing the island to the consumer through their social media platforms posting videos and photos.

The second key lesson I learned was that provenance is not enough to draw consumers in. While there is strong interest from consumers on the provenance of their food, using geographical location as the only part of your brand is not enough. There needs to be another attribute associated with location that ties to the consumer. For each company, this will be different, and is what really helps to distinguish them from their competitors. Willie Smith's is a great example of this. Having always incorporated their location of Tasmania into the brand, they recognized the need to do something else to differentiate themselves. Through the development of their organic cider house and becoming the first location in Australia to do so, they created an instant distinguishing factor that allowed them to stand out from their competitors. For Ontario, there is already strong pride for Ontario made products. While this does exist, it is not enough to draw consumers in. Ontario grain will need to determine another attribute that can tie into the provenance that will resonate with consumers. We will need to determine what our other distinguishing features are. This will be important in creating the interest, and ultimately, the demand for an Ontario grain brand.

3.0 BRAND EXAMPLES FROM THE UNITED KINGDOM

When you think of prominent regional or commodity-based brands, your mind might automatically go to Europe and the numerous products that have been generated based on their geographic location or their historic production methods. These include Champagne, originating from Champagne, France, Scotch Lamb and Beef originating from Scotland, and Welsh Lamb from Wales along with hundreds of others. Each of these is protected by geographical indications that allow them to set themselves apart from the rest of the world. Developed by the European Parliament in 1992, geographical indications and traditional specialties known as “Protected Designation of Origin (PDO), Protected Geographical Indication (PGI) and Traditional Specialties Guaranteed (TSG)”, promote and protect names of quality agriculture products. Any product registered under one of the three schemes may be marked with the logo for that scheme to help identify those products as being local to that European region. The legislation was put in place to help protect the reputation and brand of the regional foods, promote rural and agricultural activity, help producers garner premium prices, and eliminate the products using misleading labeling, causing confusion among consumers (European Commission 2013).



Figure 8. Welsh Lamb protected under the Protected Geographical Indications Scheme

The United Kingdom (UK), like many other countries within Europe, has a strong providence toward supporting local food production. This became very apparent following the 2013 horse meat scandal in hamburgers and other ready to make dishes where they were found to be laced with horse meat. The discovery led to a large uproar from consumers questioning large grocery retailers and government on their food safety protocols. While this was a challenging time for the food sector, one positive that arose from it was the commitment by consumers and the food sector to support locally grown and produced foods. After the scandal, many of the large retailers, like Tesco, made public commitments to source locally grown and produced products where possible. This proved to be a challenge for the industry, as the UK is 40% reliant on imports to meet all its protein demands (BBC News 2013).

One of the other challenges, the UK faces is the different ethnic preferences seen throughout each country and the desire to support local regional products and not UK based products. Scotland is one of the largest driving forces behind this. While part of the UK, their culture is very different from that of the rest of the UK, and as a result, they put a lot of resources toward showcasing their distinctive features. Out of all the countries in the UK, I found Scotland to be the most focused on supplying and supporting local products.

This is an interesting dynamic as the UK undergoes its foray into being independent of the European Union. What this will look like is still to be determined but may present an opportunity to develop a stronger affiliation for consumers to UK grown and produced products.

3.1 Waitrose

Since 1937 Waitrose has been owned by John Lewis Partnerships, the third largest non-traded company in the UK. In 2015, it had 352 stores located throughout the UK including stores in Jersey and Guernsey. They retain 5-6% of the grocery retail market place and are the sixth largest grocery retailer (Tesco is the largest with 50-60% market share) (Marshall 2018). The company has never been the dominant player within the grocery retail space, and as a result, has always needed to differentiate itself. One way of doing this was branding themselves as a “premium” destination shop offering higher end products. Waitrose has since expanded from this and has launched an “essentials” brand to try and connect with more of the consumer base.

Another way of differentiating themselves was to show their commitment to supporting local. Starting in the South of England, Waitrose realized a way to be successful was to show their commitment to supporting local agriculture communities. As the company started to expand further north and into Scotland, this component became even more important.

The company has a Local and Regional Buying Department whose role is to recognize regional differences across the UK and adapt the offerings in the stores to reflect the consumer’s needs. The department works with large retailers supplying 20 to 30 different locations, as well as small stakeholders that only supply one to two. There are six main areas that the regional buying department focuses on. These include: beer, cider, gin, bread, cheese and vegetables. Meat-based products are not a priority for the regional buying team as Waitrose owns several of its own livestock farms and has direct supply agreements with several others. Farms, that are part of these programs, are paid a premium as Waitrose uses their supply to brand it under the Red Tractor or LEAF programs, two prominent UK branding programs.

It is great to see the commitment of large grocery retailers like Waitrose to supporting local. It will be important in the development of an Ontario grain brand to partner with retailers like Waitrose who already put significant emphasis on supporting locally grown and processed products. In Ontario, Longo’s may be a natural fit. Like Waitrose, Longo’s has differentiated itself by its strong commitment to supporting local farmers and the local community. They have made a commitment to source Ontario-based products whenever possible based on availability (Longos Brothers Fruit Market Inc 2018). Working with a retailer, like Longos, who has this commitment already as part of their business model, will allow for higher levels of success to be achieved with the launch of an Ontario grain label and Ontario grain brand.



Figure 9. Examples of local branding on Waitrose produced products made from British ingredients

3.2 Stockan's Oatcakes Ltd

Stockan's Oatcakes has been producing oatcakes on Orkney Islands in the north of Scotland for over 100 years. As a fourth-generation family business, the company still uses the traditional Scottish methods to produce their oatcakes. Developed during the war, oatcakes were created, when soldiers took porridge and poured it on their shields, letting it dry and then cutting it into triangle shapes. This shape is still used today.

All ingredients used to make the oatcakes are brought in from other regions of Scotland, as there is no grain production on the islands, making it a truly Scottish product.

For Stockan's, the region in which their product is produced is what makes their brand and provides them with a connection to consumers. All packages contain "Orkney" in the name to reference its iconic location. Images from the islands are also used on all packaging including the old mill and the historic light house. The company is very committed to their regional brand story, as it would be much cheaper to bring the factory to the mainland. However, moving off the island would completely change their brand and marketing. The Orkney Islands are just as much a part of their product as the ingredients that go into making them. From a brand perspective, #1 is Orkney Islands and #2 is Scotland. This is even the case for export markets. Stockan's main consumer base is older generations, those that grew up eating the products. The company has devoted significant resources on better connecting with younger generations and increasing their interest in the product. The company recently launched a new package design for their mini oatcakes which are targeted at children and school lunches. The new packaging includes an animated Puffin, which are symbolic to Orkney Island, named Tod. The company wanted to stay true to the heritage of the brand while also modernizing it to connect with a new demographic. They also felt this was a great way to differentiate themselves among their competitors. The company is now very active in social media allowing consumers to gain

an understanding of the history of the product, the region in which it is produced and the nutritional benefits of consuming the product.

To achieve success such as seen by Stockan's, Ontario will need to determine its target audience for its grain brand. As Stockan's has realized one brand cannot fit each market segment. While their traditional brand of the iconic landscape of the Orkney Islands works well with their mature audience, it does not resonate with the younger generation. Ontario will need to determine its target audience from the onset to develop the brand around them. While the brand could grow to target additional audiences in years to come, it will be important to zone in on one audience to start. To help drive the highest levels of consumption of grain-based products, Ontario should focus its brand around the main household shopper, the one making most of the food purchase decisions within the home.



Figure 10. Stockan's Oatcake products showing imagery from Orkney Island where the oatcakes are produced

3.3 Quality Meat Scotland

Founded in 1999, Quality Meat Scotland (QMS) is an executive non-department public body of the Scottish government that works to promote the red meat sector in Scotland. As part of its directive, QMS markets the Protected Geographical Indication (PGI) of Scotch Beef and Scotch Lamb. This scheme helps consumers identify high quality, traditional products which are unique to the country.

To qualify for the designation for beef, all animals must be born, reared and processed in Scotland. All animals must have spent their entire life under the QMS Scotch Assured Holdings, which ensures that the highest standards of animal welfare and sustainability were followed.

For Scotch Lamb, all animals must have been reared and processed in Scotland and like the beef designation must have spent their entire lives under the QMS Scotch Assured Holdings (Quality Meat Scotland 2018).

The name “Scotch” is used for the PGI brand as this is the name that was used in the 1800’s and allows for a connection back to the history of the country. Companies that are sourcing beef and lamb not following the requirements of the PGI are still able to call it “Scottish Beef” or “Scottish Lamb” but are unable to use the PGI logo or refer to it as “Scotch”. Although a small difference, it is enough for consumers to be able to identify which products have gone through quality control to ensure they are in fact products made and produced in Scotland.

For companies to use the PGI logo and name on products, they must be registered with QMS and become members of their quality program. QMS works with the companies on their marketing campaigns to ensure they meet the brand guidelines of QMS, thus ensuring the integrity of the brand and what it stands for.

The organization also works on several consumer-facing campaigns, called “The Scotch Kitchen”, which focuses on education and awareness of Scotch Beef and Lamb including, how it was raised, animal welfare standards and sustainability. They provide recipes that are easy for consumers to make, to ensure the consumer enjoys the process of cooking with Scotch Beef and Lamb. They also use several social media platforms to connect consumers directly with the brand and what it stands for. During their last campaign, over a 6-month period, companies involved saw an increase of 17.5% in sales (Carlaw 2018).

For the organization, it was not enough to promote that Scotch Beef and Lamb was from Scotland, they needed something more to really connect with their consumer base. Through consumer research and focus groups, QMS identified animal welfare and sustainability as two additional areas the brand needed to focus on to capture the interests of consumers.

3.4 Blodyn Aur (Golden Flower)

Producing Wales’ only food grade rapeseed oil, Blodyn Aur was created in 2010 by a group of farmers looking to create more value-add opportunities for their operations. Previously involved in the biofuels industry, with their own processing facilities, the farmers saw the challenges ahead with this market and wanted to move into something different. They met with a food industry consultant who convinced them to turn their biofuel processing facility into a cold press rapeseed oil processing facility, becoming the first commercial rapeseed oil in all of Wales. To better connect with consumers, the brand of the company focuses around the natural beauty of rural Wales, along with the sustainable practices in which the rapeseed is grown. Also important to the brand was to keep the product as “natural” as possible, labeling it chemical and solvent-free. The name of the company means “Golden Flower” in Welsh, connecting it back to its geographic location, providing further connection for the consumer

that it is a local product. While the company has seen great success, they have not leveraged the story behind the farmer owners. Incorporating more of the farmers' story and their images into the brand would help drive that connection with consumers who are looking for transparency in their food products. It would also allow them to distinguish themselves even further from their competition.

3.5 Livestock Marketing Ltd

For over 25 years, Livestock Marketing Ltd. has been representing and working with sheep producers in Wales operating under the Farm Assured Welsh Lamb program. The program is government led and requires farmers to be audited annually to ensure animal welfare is followed along with producing the highest quality product. There are no membership fees to the organization and they work in a three-way partnership with producers, processors and retailers. The organization was created to drive premiums for Welsh Lamb that was being raised under the Farm Assured program. Working with over 300 producers, the organization and its producers now supply all of Waitrose "Welsh" branded lamb and two thirds of their organic lamb (John 2018). For this business, branding under the "Welsh" name is what is critical. Consumers are not interested in the specific regions of Wales that sheep are raised but are interested in knowing and wanting to support Welsh lamb in general. For them to incorporate regionalism into their brand would significantly complicate things which they feel would ultimately lead to confusion in the consumer base.

3.6 Hybu Cig Cymru (Meat Promotion Wales)

Hybu Cig Cymru (HCC) is an industry led organization responsible for the development, promotion and marketing of Welsh red meat. The organization conducts research and development, provides knowledge transfer and supports training relevant to each part of the supply chain to ensure Welsh red meat is positioned to improve quality and increase cost effectiveness. They undertake the promotional programs for the Protected Geographical Indication (PGI) of Welsh Lamb & Beef with assurance being overseen by the Welsh government. In domestic markets, they work with multiple retailers, independent butchers and food service providers with consumer-focused programs to promote the PGI of Welsh Beef and Lamb which is used in all their marketing initiatives, to ensure consumers, they can trust the quality and origin of the products. The organization has also created its own travelling food truck that works with retailers to provide samples and products of Welsh red meat to encourage more consumption.

They have created several "clubs" including "The Welsh Lamb Club" and "The Butchers Club" to provide an easy resource for consumers on where they can purchase PGI Welsh Lamb and Beef.

With only 5% of Welsh lamb consumed within the country, the organization spends a significant amount of resources on export development. Countries of particular interest include France, Germany, Italy and the Middle East.

In both domestic and export markets, HCC focuses on using “Welsh” branding and does not promote specific regions as they do not want to be seen as supporting one region over the other. In addition to focusing on the origin of the meat, HCC also focuses on the natural beauty and landscape of Wales as part of its marketing. To distinguish itself from major players from around the world, HCC uses the rolling hills and pasture-based landscape of sheep production in Wales to differentiate itself.

3.7 Linking Environment and Agriculture (LEAF)

Created as a way to provide better information on farming practices in the UK to the general public, LEAF has become the leading organization promoting sustainable food and farming. Its vision and mission center around the promotion and ability to live, eat and farm more sustainably. Overseen by a board of directors, with the Countess of Wessex as its Honorary President, the organization has grown to become a globally recognized program operating in 34 countries. The three main focus areas of the organization include:

Knowledge Exchange

- creating an environment for farmer to farmer engagement
- creating network of LEAF demonstration farms, providing learning centers for farmers, government and general consumer to learn about agriculture production in the UK and its commitment to the environment;

LEAF Marquee

- development of LEAF mark that provides the opportunity to recognize farmers in the market place that are going the extra mile; and

Public Engagement

- working to educate the general public and raising awareness of UK agriculture.

LEAF Marquee has become a leading global assurance system that recognizes more sustainably farmed products. The farms under the program are independently verified against the standards of the program. Areas of focus for the standards include integrated farm management that encompasses:

- Organization and planning
- Soil management and fertility
- Crop health and protection
- Pollution control and by-product management
- Animal husbandry

- Energy efficiency
- Water management
- Landscape and nature conservation
- Community engagement

The organization works with farmers, food industry representatives, scientists and consumers to revise the standard every five years to ensure it is setting the highest standards.

Public Engagement is also a very important aspect to the organization who works with many other organizations to create public engagement campaigns. The largest, and the one that is best known across the UK, is “Open Farm Sunday” where once a year, hundreds of farmers open their doors to the general public to learn more about their farming operation. LEAF works to provide training for the farmers to ensure they can connect directly with the consumer and provide the information they are looking for.

LEAF is not trying to create its own brand, instead it wants to be the underpin to already existing brands that are interested in sustainability and the environment. For companies partnering with LEAF can bring the credibility to the consumer that they are doing the right thing.

There are many aspects to the LEAF program that I found quite interesting and felt could be applied to an Ontario grain brand. The concept of developing demonstration farms that allow the opportunity for consumers, food retailers and government officials, to see firsthand what farmers are doing, is a critical component that could help drive an Ontario grain brand forward. Consumers and food retailers are looking for greater levels of transparency in food production; by creating demonstration farms allows them the opportunity to see production systems first hand which leads to an increased level of transparency and trust among value-chain stakeholders. LEAF’s approach to sustainability, and how they have developed their sustainability programs, is also something that Ontario should consider when developing its brand. Sustainability is a key attribute that I feel an Ontario grain brand should focus on. While consumer research will confirm this, if Ontario looks to incorporate sustainability into its brand, it should look at the success that LEAF has had and mirror their approach.

3.8 Red Tractor

As one of the most recognized branding programs in all the UK, Red Tractor was created in 2000 as a response to consumer demand for an easily recognizable symbol to identify local food products that were produced to a high-quality standard. What started as a simple red tractor logo placed on products has turned into the largest food standards scheme in the UK covering animal welfare, food safety, traceability and environmental protection. It is also the only scheme that offers full traceability from farm to pack.

Run as a not-for profit, the organization operates on a buy licensing agreement paid by farmers and food companies. It is governed by a board of directors with representation by the National Farmers Union, Agriculture Horticulture Development Board, Dairy UK, the British Retail Consortium as well as independent experts including academics, scientists, vets and professionals representing the consumer base.

The organization works with farmers, grocery retailers and the food sector. Today, over 2000 food service products display the Red Tractor logo with over 75% of UK vegetable and fruit farms assured under the program (Red Tractor 2018).

In 2014, the organization decided to incorporate a new standard that would allow companies to use a “Made With” symbol to highlight products whose main ingredient was from the UK, while other ingredients may be sourced from elsewhere. This new standard allowed more companies within the food sector, especially those making ready to eat meals and pies, to be able to get involved with the program.

Today, there are three main standards under the program which allow companies flexibility depending on their operations.

Standard Red Tractor Logo

- Products must contain 95% Red Tractor certified ingredients

Named Ingredient

- Processors can use this logo to highlight the main ingredient is produced to Red Tractor standards i.e. pork in sausage
- Must be noted on label to make it clear it refers to one ingredient and not entire package
- Named ingredient must comprise at least 65% of finished product
- All named ingredients must be assured i.e. all pork in sausage must be assured

Made With

- For use on multi-ingredient foods such as ready meals and pies where the characterizing ingredient is assured but makes up less than 65% of finished product
- “Made With” claim must relate to characterizing ingredient
- In two protein products, both proteins must be assured (Red Tractor 2018)

To ensure the integrity of the program and the compliance of the strict standards set out by Red Tractor, there are over 450 independent inspectors conducting over 60,000 audits annually. To build trust with the consumers, all auditing is done by a third party to help increase transparency associated with program (Red Tractor 2018).

While it may have started out as a simple way to help consumers identify high quality locally produced food products, Red Tractor has evolved over the years to ensure it continues to meet the demands of the consumer. Today, in recognition of the additional transparency the consumer is looking for, the organization incorporates animal welfare, food safety and sustainability into its programs.

Red Tractor is one of the main reasons I went to the UK. I saw it as a program that could have a lot of applicability for Ontario grain. The brand has attributes that apply very well to Ontario including quality assurance, traceability and sustainability. The white circle with the red tractor inside has become a recognizable symbol across the UK and can be seen on many products in grocery stores. I had the opportunity to travel to several grocery retailers throughout the UK including discount stores as well as high end boutique stores. Each one contained products using the Red Tractor logo. Some products made it more visible by placing it on the front of the package while others were found on the side or back of the package. While most of the products containing the logo were fruits, vegetables, meat or dairy based products, I was surprised to see how many grain based products were also using it. The two most recognizable companies were Shreddies and Weetabix, who both featured the logo with “wheat” written underneath. To me, this solidified what I had already thought about the program and its applicability to grain-based products.

One of the biggest things that struck me while studying Red Tractor was the approach it decided to take in developing a program that represented all the UK. Instead of developing something for one specific country over the other, it took the approach of developing something that would highlight UK grown foods. This was really the first time I considered the development of a National grain brand versus an Ontario specific brand. There are many reasons why developing a national grain brand versus an Ontario specific brand make sense. While it may remove some of the feelings of “local” around the products, I believe it will lead to higher opportunities of success.

Most of the wheat varieties grown in Ontario are lower protein varieties than those grown in Western Canada, and therefore do not provide the functionality that is required for several products, including bread. Having an Ontario only grain brand would not allow companies using wheat blends to be able to participate in the program, limiting the marketing opportunities it would have. Most food manufacturers and grocery retailers are national with locations across the country and are not interested in province specific branding programs because they add additional costs to their production. By having a national grain brand it would allow for more opportunities to work with food manufacturers.



Figure 11. Examples of Red Tractor branding on cereal boxes promoting they use British wheat

3.9 Lessons Learned

Unlike Australia, the UK is very different from Canada in many ways. With a small land base and high population densities, the UK faces challenges not always seen in Canada.

Surrounded by large populations, agriculture in the UK is constantly put under the microscope and is often associated with large amounts of criticism. A report by The Environmental Funders Network indicated that one in ten UK adults is a member or supporter of Britain’s environment and conservation groups (Cracknell, Miller and Williams 2013). It has been critical for the UK agriculture sector to develop programs to help connect consumers with primary agriculture and where their food comes from. This can be seen with the development of two of the UK’s most well-known programs, Red Tractor and LEAF. Both were created as a way to highlight UK farming to consumers while also making it easy for them to identify products made with UK commodities. Red Tractor has had the most success from a pure brand perspective; now involved with over 75% of UK’s fruit and vegetable farms and on over 2000 food products (Red Tractor 2018). Their brand, seen on a wide variety of products, is very evident as you walk through the grocery store aisles. While agriculture in Ontario and Canada does not face as much scrutiny as it does in the UK, it is still present, and a program such as Red Tractor could be a great way to deepen the connection between consumers and farming.

The key lessons learned in the UK were very similar to that in Australia, regarding the attributes needed when building a brand. Each company I met with put emphasis on the provenance of their products. For them, this was a critical part of their brand. Different from Australia, this seemed to be enough for many companies. While in Australia companies were adding in additional attributes such as non-gmo, organic or animal welfare in the UK, geographic location

seemed to be enough to draw consumers in. This I feel is largely due to the history that is found within the UK. Many of the geographic locations being highlighted in the brands were hundreds of years old. Inherently built into the brands was this historical aspect that seemed to really draw consumers in. Unfortunately for Australia and Canada this historical aspect is not present and there is a requirement for additional attributes to be included to connect with consumers. Unlike Australia, many of the UK companies and organizations put a large emphasis on conducting consumer research prior to building the brand. At almost every meeting, the importance of good consumer research was highlighted. They felt this was a critical step in building the foundation of their brand. Without it, they would be challenged to understand the attributes needed to connect the best with the consumer. While many Australian companies were also conducting research, it seemed to be very top of mind in the UK.

In travelling around the UK, I also learned the value of keeping a brand simple. Far too often brands try to be everything to everyone, and ultimately end up failing because the confusion they cause. This wisdom was very evident with Stockan's Oatcakes in Scotland. Their brand was built around the region in which they produce their product the Orkney Islands. While they have looked at incorporating other elements into the brand, they have stuck with their region and built around this. Keeping things simple and focused on one main attribute has allowed the company to be in existence for over 100 years.

The most important lesson I learned from all the companies and organizations I visited was that you can achieve just as much success, if not more, by taking a national approach to developing a brand versus a provincial or state approach. Under the national brand, you would still have the ability to highlight Ontario grains, however you would have an overarching national brand to tie back into. This approach will allow the opportunity to partner and work with more of the multi-national corporations who can drive consumer consumption.

4.0 BRAND EXAMPLES FROM CANADA

There are several iconic brands and marketing campaigns that are well known by consumers in Canada. One of the most recognized is Dairy Farmers of Canada's "Quality Milk" campaign. Started in 1994 after the merger of Dairy Farmers of Canada (DFC) and the Dairy Bureau of Canada, the campaign focuses on increasing consumer knowledge around the products Canadian milk goes into. It also works to remind consumers of the many health benefits associated with milk. The iconic blue cow logo was created as a way to easily identify Canadian products made with Canadian milk and distinguish itself from American based products using modified milk ingredients.

In 2016, the campaign went through an overhaul providing a fresh perspective to consumers of Canadian milk. One of the main driving factors behind the brand change was consumer

research that identified the age category of 18-34 year who found milk “boring” (Bienvenu 2018).

As a result, DFC set out to create a campaign that brought more excitement to Canadian milk and milk products. In addition to a change in the logo, they also created a website to drive consumers to get more information on quality standards.

The change in logo included moving away from the blue cow to include a standing cow, proudly looking forward, bearing the Canadian Maple Leaf. The cow stands on a box that represents all different kinds of farm ground and bedding. The words “Dairy Farmers of Canada” are included to highlight the farmers who are committed to providing a high-level product. This was a critical point that was felt to be lacking from the previous campaign to really resonate with consumers that the products are made by high quality milk produced from Canadian farmers (Bienvenu 2018).

The brand is national and does not highlight any specific regions. Regional specific initiatives do occur; however, these are managed by the local provincial dairy boards and are run in conjunction with the national “Quality Milk” campaign.



Figure. 12 Examples of Dairy Farmers of Canada Blue Cow logo on packages

4.1 Lessons Learned

I choose to look at only one brand in Canada as I thought it had the most applicability to the grain industry. After the realization I came to from my travels throughout the UK on the development of a national brand versus a provincial brand, Dairy Farmers of Canada presented a unique perspective on the success you can achieve with national versus provincial campaigns. Like the grain industry, there are provincial and national organizations working on behalf of dairy farmers. Dairy Farmers of Canada is the voice of Canadian dairy farmers and focuses on policy development, lobbying and marketing solely from a national perspective. The

development of their national “Quality Milk” program allowed for the same consistent messaging to be seen and heard from across the country. The grain industry could benefit from something very similar to this. While the “Quality Milk” program highlights the quality of Canadian milk, it ultimately helps drive the consumption of products in each individual province. A national grain brand and campaign could be set up in a very similar manner. The other key thing I learned from meeting with Dairy Farmers of Canada is how long a brand can take to resonate. In Canada with our supply-managed system, all fresh milk is produced by Canadian dairy farmers. As a result, you think it would be easy for Canadians to identify fresh milk products as being local. This is not the case though, and this was really the driver behind Dairy Farmers of Canada creating their Quality Milk Campaign. The campaign was not an instant success though, and has gone through variations over the years. It is critical to truly believe in what you are doing, be passionate about it and be willing to stick with it for the long haul. The other lesson was to not be afraid to change your brand. Through their consumer research, Dairy Farmers of Canada were able to see their current brand was not resonating with consumers the way they wanted it to. As a result, the brand went under a refresh. While you always want to stick to the attributes and principles behind your brand, sometimes a change is needed to ensure your brand is telling the story you want it to.

5.0 CONCLUSIONS

Throughout my travels it became evident that there is a need for Canada to develop a strong easily identifiable brand and marketing program for our grain sector. While there are some programs throughout the country working to support local food products, there are not any that focus on the entire grain sector.

It is critical for us as an agriculture industry to work together to develop a comprehensive initiative that can help each of our individual grain sectors grow. We have been given the perfect platform to build off, with the increase in demand for food transparency wanted from consumers and their desire to support local. Without embracing this, as an industry, we risk missing the opportunity to provide a further connection to the consumer about Canadian grain production.

Through the development of a brand and marketing campaign we can drive utilization of grain-based products while also increasing the education and awareness of Canadian grain.

Although I had the opportunity to meet with several different companies and organizations, I was not able to come across any specific branding programs focused solely on grain. The applications being used by other agriculture sectors, however, are applicable to grain with the opportunity to achieve similar success.

Lessons Learned

There are several lessons I have learned while meeting with companies, organizations and government agencies. While you can have tremendous success with a well thought out brand and marketing campaign, you can just as easily fall flat and miss your opportunity. The five key takeaways I have included are:

- 1) Commodities can be branded. There is an opportunity to brand commodities that are further processed into ingredients. The way, in which to achieve this, is through the development of a grain label with an accompanying brand campaign. The label provides an opportunity not only for companies to better highlight their grain-based products, but also a way for consumers to easily identify products made with Canadian grain. From the label, you can develop a complete brand that builds off the attributes of the label and allows for the story of Canadian grain to be told. My studies have shown that to be successful this label should be done at a national level and not at a provincial level. When you look at all the successful brand campaigns related to agriculture products, they are all national in focus. Whether this is Red Tractor in the UK or True Aussie in Australia, they have all used the power of the nation to help drive their brand. Canada needs to look to do the same.
- 2) Include local as part of the brand, but do not make it the only focus. While many consumers are supporting local, it is often because it is tied in with being more sustainable or leading to higher welfare standards. There needs to be an additional component that ties into the local aspect in order to be successful. For the Canadian grain sector, I think sustainability, and especially that of environmental sustainability, should be our linking arm. Known for producing some of the highest quality grain around the world, the brand provides the opportunity to share the sustainable practices Canadian farmers use that help achieve this high level of quality. This could include our use of minimum tillage, the commitment to increasing biodiversity on our farms and the use of precision agriculture to be more efficient with our inputs.
- 3) Keep your brand simple. The more aspects you try to bring into your brand and marketing campaign, the higher likelihood you have of causing confusion with the consumer and losing them altogether. Identify the one or two things, you want your brand to stand for and run with these. While additional elements can be pulled in, they should always tie back into the one or two main objectives of the brand.
- 4) Take the time to do research. Today more than ever it is critical to understand what the consumer is looking for. Take the time, prior to building the brand, to conduct consumer surveys and focus groups to identify exactly what it is Canadians are interested in

regarding the grain sector. While I feel that sustainability would be a natural tie-in to a Canadian grain brand, this perhaps is not a high priority for consumers and some other aspect may be more suitable to incorporate.

- 5) Provide support to the brand. It is critical for the Canadian grain industry to develop support material that goes behind the brand and to offer resources to companies who are interested in using it. While large multi-nationals will have resources in-house, many small stakeholders will not have these resources available, and without outside assistance, may move away from being involved in the initiative.

6.0 RECOMMENDATIONS

There are several steps that will need to occur for a brand to be developed. Below are a list of recommended next steps that would help lead to the creation of a Canadian grain brand.

1) Development of Steering Committee

The committee would include representatives from across the Canadian grain value chain, including producers, processors, industry organizations and end users. The committee would help guide the direction of the formation of a Canadian grain brand by providing feedback through all the critical components. This feedback would lead to the development of a concrete business plan that could be shared with the industry to advocate for support. The steering committee would also solicit the necessary funds to help support the initial development work needed to develop the brand.

2) Conduct Consumer Research

Identified by several successful brands from around the world, consumer research is a critical component of brand development. An initial consumer survey along with focus groups should be completed to identify the area's most pressing for consumers on the Canadian grain sector. Questions should be targeted to ensure answers provided will give clear direction on the areas of focus the brand and supporting market campaign should incorporate.

3) Determine Overall Objectives for Brand

Based on the consumer research, overall objectives for the brand and marketing campaign should be developed. This could be the vision or mission statement for the brand. Based on this, a draft logo and supporting marketing material can be developed.

4) Additional Consumer Research

Once a draft of the brand and marketing campaign have been developed, conduct additional focus groups to see how it identifies with the consumers.

5) Present Concept to Industry

The above four steps will provide a solid foundation for the development of a Canadian grain brand. Based on the information generated in these steps, a presentation should be generated that could be shared with industry members at a large grain industry event. The presentation would highlight the concept of the brand and its ability to drive utilization for Canadian grain and increase consumer demand.

6) Pilot

Work with a food retailer to conduct a pilot of the brand.

The development of a brand and marketing campaign for the Canadian grain sector is no small feat and will require significant resources. It will take the commitment of industry members and their respective organizations to be successful. It will also take significant financial resources. The steering committee should look to government-based funding that may be available to help support the initiative. While there will be many challenges, it also presents a great opportunity to create an identity for the Canadian grain sector. Compared to other agriculture sectors across the country, the grain sector has not been successful at building an identity with consumers. As a result, they have lost the direct connection with them. The development of a grain sector label allows us not only to create an identity for ourselves but helps build up the trust of consumers on grain-based products.

“Only those who will risk going too far can possibly find out how far it is possible to go.” — T.S. Eliot

7.0 GLOSSARY

Agriculture goods – products made from crops and livestock production

Black Label - premium brand product

Expeller Press – a mechanical method for extracting oil from raw materials

Macquarie River - a watercourse that is part of the Macquarie–Barwon catchment within the Murray–Darling basin; is one of the main inland rivers in New South Wales

MVGWTA – McLaren Vale Grape Wine & Tourism Association

Non-GMO – non-genetically modified organisms

Open Market - an economic system with no barriers to free market activity

Organic Production - a production system that is managed to respond to site-specific conditions by integrating cultural, biological, and mechanical practices that foster cycling of resources, promote ecological balance, and conserve biodiversity

Paddocks – small field or enclosure where animals are kept

Provenance – origin

QR Codes - a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone

Social Media - websites and applications that enable users to create and share content or to participate in social networking.

Social Media Platforms - a web-based technology that enables the development, deployment and management of social media solutions and services

8.0 REFERENCES

- Australian Export Grains Innovation Centre . 2016. *Australian Grain Production - A Snapshot* . August 22. Accessed August 11, 2018. <https://www.aegic.org.au/australian-grain-production-a-snapshot/>.
- BBC News. 2013. *Tesco Pledges to Sell Meat Closer to Home* . February 23. Accessed August 11, 2018. <https://www.bbc.com/news/uk-21597596>.
- Biennvenu, Josee, interview by Nicole Mackellar. 2018. *Nuffield Canada Research on Regional Branding* (June 13).
- Birch, Robin, interview by Nicole Mackellar. 2017. *Nuffield Canada Research on Regional Branding* (November 20).
- Business Development Bank of Canada . 2013. *Mapping Your Future Growth - Five Game Changing Trends*. October . Accessed August 8, 2018 . https://www.bdc.ca/Resourcess%20Manager/study_2013/consumer_trends_BDC_report.pdf.
- Carlaw, Suzie, interview by Nicole Mackellar. 2018 . *Nuffield Canada Reserach on Regional Branding* (April 20).
- CBC News . 2015 . *5 Keys to Understanding Millennials* . February 13. Accessed August 8 , 2018 . <https://www.cbc.ca/news/canada/hamilton/headlines/5-keys-to-understanding-millennials-1.2955624>.
- Cracknell, Jon, Florence Miller, and Harriet Williams. 2013. *Passionate Collaborations?* Sector Report , Environmental Funders Network .
- Euromonitor International . 2017. "Has Meat Met its Match? The Future of Plant-Based Protein." *Euromonitor International* . September 27. Accessed September 9, 2018. <https://blog.euromonitor.com/2017/09/has-meat-met-its-match-the-future-of-plant-based-protein.html>.
- European Commission . 2013. *Geographical Indications* . June 28. Accessed August 11, 2018 . <http://ec.europa.eu/trade/policy/accessing-markets/intellectual-property/geographical-indications/>.
- Farm and Food Care Ontario . 2018. *Faces of Farming* . Accessed October 28, 2018. <http://www.facesoffarming.ca/longo-brothers-fruit-markets/>.
- Forbes . 2017 . *Food Leaders Take Notice: How Millennials Are Changing the Way*. August 26. Accessed August 8, 2018. <https://www.forbes.com/sites/deeppatel/2017/08/26/food-leaders-take-notice-how-millennials-are-changing-the-way-we-eat/#176ad21c7175>.
- Free Map Tools. 2018 . *Population Maps* . Accessed August 13, 2018 . <https://www.freemaptools.com/find-population.htm>.
- Grain Farmers of Ontario . 2018. *Grain Farmers of Ontario* . Accessed August 11, 2018. www.gfo.ca.

- Howe, William , and Neil Strauss. 2000. *Millennials Rising: The Next Generation* . New York : Vintage Books .
- Huon Aquaculture. 2018. *Sustainability Dashboard*. Accessed August 11, 2018. <https://dashboard.huonaqua.com.au/>.
- Impos. 2017. *Food for Thought: Our 2017 Hospitality Survey Results Revealed*. May 17. Accessed September 9, 2018. <https://impos.com.au/blog/australian-hospitality-survey-stats-2017/>.
- John, interview by Nicole Mackellar. 2018 . *Nuffield Canada Reserach on Regional Branding* (April 24).
- King Island Tourism . 2011. *King Island Beef* . Accessed August 11, 2018 . <http://www.kingisland.net.au/king-island-brand/king-island-beef-group>.
- Longos Brothers Fruit Market Inc. 2018. *About Us*. Accessed October 28 , 2018. <http://www.longos.com/SiteMap/AboutUs.aspx>.
- Loyalty One . 2015. *Consumer Purchasing Behaviours*. Loyalty One .
- Lynch, Jennifer, interview by Nicole Mackellar. 2017. *Nuffield Canada Research on Regional Branding* (November 15).
- Manitoba Consumer Monitor Food Panel. 2016. "Food Choices Local and Organic Food."
- Marshall, Tracy, interview by Nicole Mackellar. 2018. *Nuffield Canada Research on Regional Branding* (April 16).
- Mckibben, Abbey, interview by Nicole Mackellar. 2017. *Nuffield Canada Research on Regional Branding* (November 24).
- McLaren Vale Grape, Wine & Tourism Association. 2018. *McLaren Vale, One Region, So Many Worlds* . Accessed August 11, 2018. <https://mclarenvale.info/>.
- Miller, Genya, interview by Nicole Mackellar. 2017. *Nuffield Canada Research on Regional Branding* (November 30).
- Ministry of Natural Resources. 2016. *Forest Resources of Ontario 2016*. Accessed October 28, 2018. <https://www.ontario.ca/document/forest-resources-ontario-2016>.
- National Restaurants Association . 2017. *Restaurant Industry Forecast Report* . April . Accessed September 9, 2018. <https://www.restaurant.org/News-Research/Research/Forecast-2016>.
- News, CBC. 2015. *5 Keys to Understanding Millenials* . Toronto , February .
- Ontario Ministry of Agriculture, Food and Rural Affairs . 2018. *Area, Yield, Production and Farm Value of Specified Field Crops, Ontario, 2012 - 2017 (Imperial and Metric Units)*. April 18. Accessed August 11, 2018. http://www.omafra.gov.on.ca/english/stats/crops/estimate_new.htm.
- Quality Meat Scotland . 2018. *Quality Meat Scotland Assurance Scheme - 2018 Cattle and Sheep Standards* . Standards Setting Report , Newbridge: Quality Meat Scotland.
- Red Tractor . 2018 . *Home Page* . Accessed April 18, 2018 . <https://www.redtractor.org.uk/>.

Red Tractor. 2018. *Standards Chart* . Accessed April 18, 2018. <https://www.redtractor.org.uk/what-we-do/standards-chart>.

Statistics Canada . 2018 . *Canada at a Glance: 2018 Population* . Accessed August 8, 2018. <https://www150.statcan.gc.ca/n1/pub/12-581-x/2018000/pop-eng.htm>.

Wolfhagen, Julian, interview by Nicole Mackellar. 2017. *Nuffield Canada Research on Regional Branding* (November 22).

Yes Lifecycle Marketing . 2018. *A Marketer's Guide to Reaching Each Consumer Generation*. Accessed September 9, 2018. <http://www.yeslifecyclemarketing.com/campaign/whitepaper/marketers-guide-reaching-each-consumer-generation-dm>.