



GROWING INTERNATIONAL

Exploring the potential of growing ethno-cultural food markets in the GTA

A FarmStart Publication

Research by:

Filip Hadrer

Melissa Benner

Edited by:

Shauna Bloom

Christie Young



FARMSTART
supporting a new generation of farmers

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Executive summary

The cultural diversity in the Greater Toronto Area (GTA) offers exciting opportunities for creating local food networks within ethno-cultural communities. This particular study was undertaken to identify marketing channels, purchasing behaviours, and product demand within culturally diverse communities. It was an exploratory study conducted among retailers, restaurants, and processors, designed to assess the potential for local production of ethno-cultural food products that can serve three of the largest ethno-cultural markets in the GTA: Chinese, South Asian and Afro-Caribbean.

Community interviews explored traditional and alternative food supply chains serving the Chinese, South Asian and Afro-Caribbean markets. Demand for specific products in four distinct product categories: (1) vegetables, (2) grains, beans and pulses (3) meat (4) herbs and spices was assessed as well as the attitudes, values, product needs, and service requirements of food buyers in each community.

It was discovered that many of the products are sourced from Ontario and almost half of the produce sourced locally is being traded directly between food growers and buyers. In addition, there are a larger number of local producers growing specifically for the Chinese and South Asian markets. Freshness, price, and availability were the most important purchasing criteria for all three ethno-cultural communities.

It is clear from the study that there are opportunities for growing a strong local food economy in the ethno-cultural communities. The Chinese market is already a very established market and members of the community own most parts of the supply chain. The South Asian market has some local product but shows strong potential for expanding local and direct production and distribution. The African-Caribbean community (mainly Caribbean) will be the most challenging market to develop locally. The strong ties to farmers in the Caribbean and the climatic differences create barriers to developing local markets.

Through interviews with members of each community, researchers were able to put together some important issues that should be considered when developing a local supply chain in ethno-cultural communities. The major issues included taking cultural background into consideration, understanding the community and food buyer preferences and exploring niche markets that will be interested in specialty products, specific production practices, and special certifications.

Currently there is strong demand for year-round greens, mushrooms and poultry in the Chinese community. Meat (especially off-cuts) and herbs are in high demand in the South Asian communities and the African-Caribbean community. The report includes a complete list of popular products and products in high demand for each community.

This was a preliminary study designed to clarify the current situation and explore areas for further study. The sample sizes used in each of the communities are not representative of the total markets. Further study of product volumes, prices, and demand for supply-chains in each community would enhance the information provided in this report.



“It is clear from the study that there are opportunities for growing a strong local food economy in the ethno-cultural communities.”

Introduction and Background

Canadians are increasingly recognizing the quality and availability of fresh local foods grown and processed in Ontario. In diverse areas such as the Greater Toronto Area (GTA), these emerging local markets are increasingly including ethno-cultural foods desired by a wide range of ethno-cultural communities.

About half of Greater Toronto's population (2.3 million people) was born outside of Canada (Statcan 2007a). Between 2001 and 2006 about 450,000 new Canadians have arrived and settled in the GTA (Statcan 2007a). The largest and fastest growing immigrant communities are the Chinese and South Asian communities, with each accounting for one tenth of the total visible minority population.

According to Ekos Research 1994, there exists broad market opportunities for the agriculture industry to supply the Canadian market with ethno-cultural foods that are not currently on the market or imported from outside of Canada, develop value-added ethno-cultural foods, and target comparable ethno-cultural markets outside Canada for export. A study conducted by Ekos Research Associates observed that there is *limited domestic production* of ethno-cultural foods, beyond supplying some fresh produce in season and repackaging of imported foods. The study concluded that meeting the gaps in this industry can provide Canada with a *sizable growing market* for ethno-cultural food production.

Although the Ontario agricultural community is beginning to make local connections to some of these ethno-cultural markets, it has been suggested that the producers "don't have a handle on what they [the ethno-cultural community] want" (Stoneman, 2006:10). In addition to lack of knowledge or understanding of market demands, there are often financial, structural and cultural factors that affect a farmer's ability to diversify and take risks on new products (Duram, 1997; Fairweather, 1999). For farmers who may be interested in trying new crops, the microclimate and intensive cultivation for South Asian, African and Latin American vegetables often pose many challenges.

There is a strong interest in identifying marketing channels, purchasing behaviours, and product demand within culturally diverse communities. Each immigrant community offers specific characteristics within the food chain, which lend to specific opportunities and challenges for adding local products to the food chain. The food chains present in these communities tend to be informal and independent (unlike mainstream grocers) which means there is potential to expand options for local products. Identifying demand through consumer studies is an expensive endeavour but often food buyers (those individuals responsible for sourcing products for retailers and restaurants) have a good knowledge base of the consumer demands in a specific community.

This study was undertaken to provide a better understanding of food supply chains in specific immigrant communities in the GTA. Specifically, the study was designed to assess the potential for local production of ethno-cultural food products that can serve three of the largest ethno-cultural markets in the GTA: Chinese, South Asian and Afro-Caribbean. The information gathered during this study is meant to help guide future research endeavours.

The researchers interviewed retailers, restaurants, and processors in the Chinese, South Asian, and African-Caribbean food industry in the GTA. This research was largely informed by existing literature on ethno-cultural food production in North America, notably, *Ethnic Markets and Sustainable Agriculture* (Lawrence 1998) and, most importantly, *Survey Methods and Identification of Ethnic Crops for the East Coast in the USA: A Procedural Synopsis* (Govindasamy et al., 2007). It was also designed in consultation with community members through with two workshops conducted with leaders from various ethno-cultural communities, researchers and food organizations serving these communities.

Methodology

A survey of 25 retailers, restaurants, and processors (food buyers) was completed in the Chinese, South Asian, and African-Caribbean food industry in the GTA. The survey among food buyers was a pre-tested semi-structured questionnaire¹. The questions were grouped into the following categories: attitudes, most popular items, product and service requirements, sourcing information, and price levels.

Field researchers familiar with the distinctive cultures were selected to complete the interviews. Questionnaires used with Chinese and South Asian individuals were translated by the interviewer to Cantonese and Punjabi respectively. For each community, interviewers were asked to interview four food buyers in the retail (one small, one big, and two medium sized grocers), restaurant, and processor industries.

Additionally, interviews were conducted with the general manager of the Ontario Food Terminal, the main produce buyer from a food terminal warehouse, and produce buyers from two independent supermarket chains.

Findings

Summary

The findings provide a preliminary picture of the opportunities and challenges for local food production and indicate areas where further market research is needed.

The findings identify:

1. Traditional and alternative food supply chains serving the Chinese, South Asian and Afro-Caribbean markets.
2. High demand items across four distinct product categories: (1) vegetables, (2) grains, beans and pulses (3) meat (4) herbs and spices
3. Attitudes, values, product needs, and service requirements of food buyers.

Overview of the Sector

Local sourcing - Current situation

The current food supply chains serving the Chinese, South Asian, and Afro-Caribbean communities utilize a mix of local producers, food sourced from the Ontario Food Terminal, or food sourced directly from the importing country. The majority (see figure 1) of the interviewed food buyers purchase at least some vegetables from Ontario, in particular, commodities such as carrots, potatoes, and cauliflower. There were only two retailers not carrying local produce. These were specialty retailers in the African-Caribbean community focused on providing items not available in Canada.

1. Semi-structured questionnaire: Includes closed questions where respondents had to choose from a set of options, as well as open ended questions which give room for more extended responses.



FIGURE 1. PERCENT VEGETABLES PURCHASED FROM ONTARIO

Almost half of the produce sourced locally is being traded directly between food growers and buyers (see figure 2). Another 16% would consider buying directly from producers if it was convenient for them. Only 36% are not in contact with local producers and not likely to source local products in the future. Direct purchasing was more common for the Chinese and South Asian market and less common for the African-Caribbean retailers. There are a larger number of local producers growing specifically for the Chinese and South Asian markets because the specialty items desired by the African-Caribbean markets are more difficult and expensive to grow in Ontario's climate.

FIGURE 2. PERCENT FOOD PURCHASED DIRECT FROM FARMS

The food buyers, who participated in the study, were asked about potential business opportunities with locally grown products. Some food buyers believe that more local choice would improve availability, lower prices, and lower shipping costs. One processor stated that improved selection would allow him to diversify his product portfolio and to go into the ethno-cultural local/organic niche market. In contrast, other food buyers do not believe that local production will change their business practices. They argue that the top-selling specialty items have to be imported because they are difficult and expensive to grow in Canada and for the most part they already source locally when possible.

Food Buyer Needs

An important part of the study was to identify the most important criteria food buyers use to make purchasing decisions. Figure 3 shows the food purchasing preferences for each of the major ethno-cultural groups represented in the study.

FIGURE 3. FOOD BUYER PREFERENCES

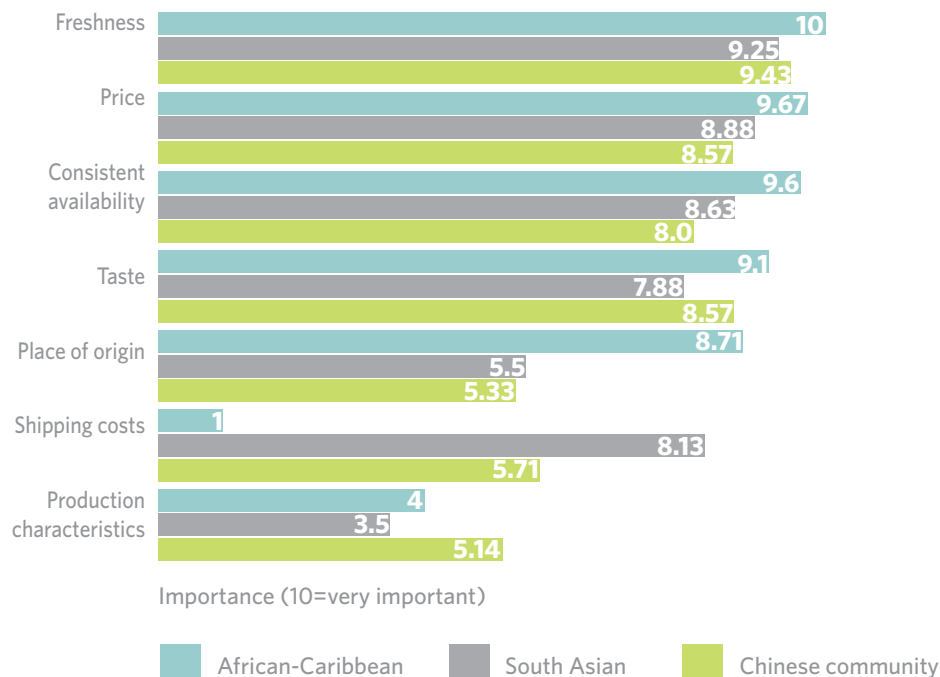


FIGURE 1: FOOD BUYERS BUYING ONTARIO VEGETABLES

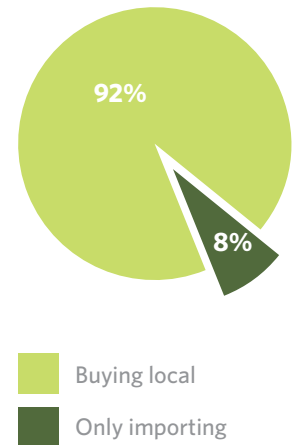
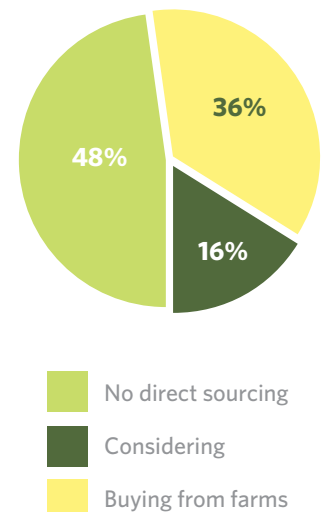


FIGURE 2. PERCENT FOOD PURCHASED DIRECT FROM FARMS



Freshness, price, and availability were the most important criteria for all three ethno-cultural communities. These preferences should be highlighted when creating new partnerships between producers and food buyers.

Food buyers were asked about any additional information they require when purchasing from local producers. They typically request an updated price-list, contact information, and delivery schedule. They would also like to see evidence of quality and freshness. Most produce buyers would like to receive samples before purchasing; however pictures sent by e-mail are sufficient once a solid business relationship is established.

Packaging was a major issue of concern. The basic message that respondents gave us was keep it simple. Whatever packaging is used to maintain quality should be stripped of excessive parts. Boxes should be suitable for mid-term storage without requiring re-packaging. When dealing with meat, food buyers would like to prevent the need for cleaning the spots where the case had been sitting. The outside of the package should contain information about production characteristics, where it was produced, and by whom. When selling to a distributor², information requirements are typically more stringent. Packages must clearly identify content, quantity, grade, and responsible party. Finally, food buyers suggested using bright colours on the outside of the packaging to help attract customers.

Ethno-cultural background and business practice

Does ethno-cultural background have an effect on how owners/managers purchase goods? Some interviewees could see that their ethno-cultural background influenced their business operations because they were familiar with the traditional items, ingredients, and flavors. “It is important for some to know what they’re selling!” and “it helps to adapt the selection of food to your customers’ background”. A retailer with East African origin said that “it’s easier to make purchases” and “I make more money since many customers are East African”.

Other food buyers said that their personal background didn’t matter because they “just buy what customers want” and are often selling to a variety of communities. As a consequence, one respondent claimed, “personal relationship is more important than personal background”.

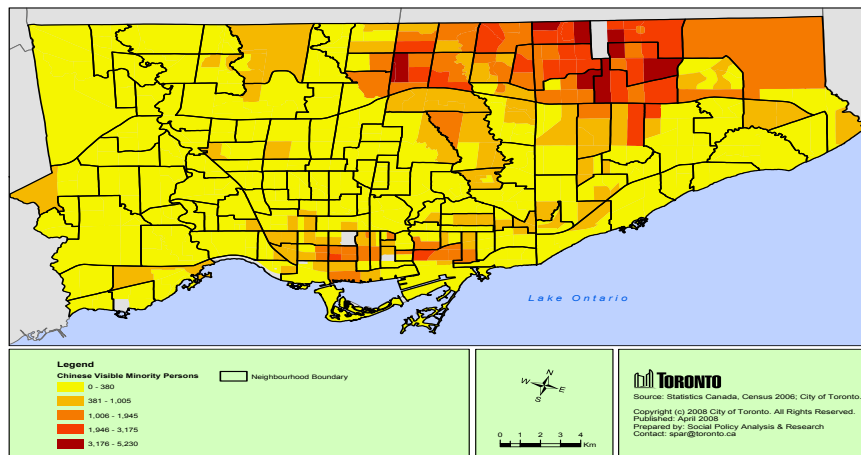
It is clear that ethno-cultural background needs to be taken into consideration when developing a business relationship. Language and culture can be a barrier in some cases but often these barriers can be overcome by working with community members.

2. “Distributive trade services [Distributors, Wholesalers] consisting in selling merchandise to retailers, to industrial, commercial, institutional or other professional business users, or to other wholesalers, or acting as agent or broker (wholesaling services) or selling merchandise for personal or household consumption including services incidental to the sale of the goods [retailing services].” (Source: UNSTATS 2008 - United Nations Statistics Division)



Chinese Market

FIGURE 4. POPULATION FIGURES FOR THE CHINESE COMMUNITY



City of Toronto 2006a

Members of the Chinese visible minority group

Toronto CMA/GTA	486,330
Ontario	576,975

Chinese Immigrants

Toronto GTA/CMA by place of birth	
China, People's Republic of	191,120
Hong Kong	103,090

Recent Chinese immigration to Toronto CMA/GTA by place of birth, 2001-2006

(Statcan 2007c)

China, People's Republic of	63,860
Hong Kong	3,145



The Community

Immigration from China, Taiwan, and Hong Kong began to increase after 1967 due to changes in immigration policy. The newly introduced point system also changed the occupational background of immigrants, from mostly labourers of earlier days to highly educated and upwardly mobile recent arrivals (Chui et al. 2005).

Geographically, the local Chinese community has spread to new neighbourhoods in the suburbs, diminishing the significance of a historic downtown Chinatown. Figure 4 shows the areas that have a prevalent Chinese community. The first one is located in the Northeast of Toronto, north of Highway 401 and the traditional neighbourhoods are located along Spadina Avenue and in the Danforth.

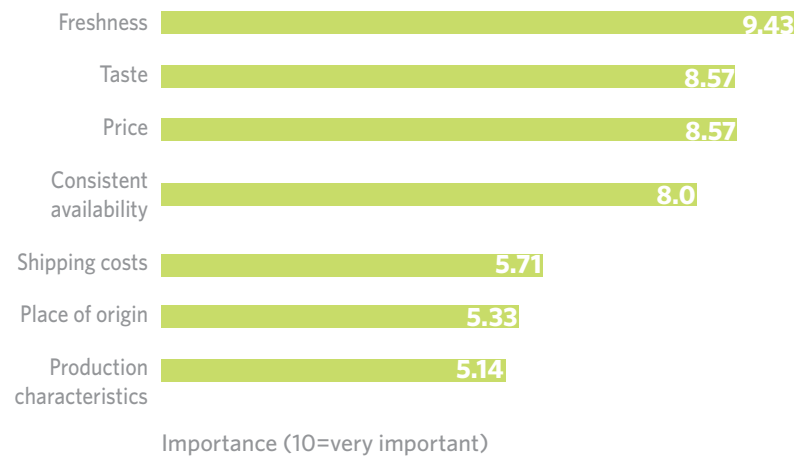
The main language of the community is traditionally Cantonese (prevailing in Hong Kong and Guangdong province), but Mandarin speakers have dominated more recent immigration. The main language of conversation in the grocery and restaurant industries is still Cantonese, rather than Mandarin or English.

The community has developed a strong food chain infrastructure aimed at serving its own ethno-cultural members. Today, most parts of the Chinese specialty food chain are serviced by businesses owned by members of the local Chinese community. Apart from a very vibrant retail and restaurant industry, we were able to identify a great number of Chinese-Canadian distributors, processors, and even local farmers. According to one of our interview partners, many of the shop owners started out as co-workers in the 1980s, which has created a sense of familiarity and solidarity among current competitors.

Food Buyer Preferences

Figure 5 shows the factors important to food buyers in the Chinese community when purchasing fresh food items, such as vegetables, herbs, flowers, and meats.

FIGURE 5. PREFERENCES OF THE CHINESE COMMUNITY FOOD BUYERS



The most important factor for the Chinese community is freshness. Chinese food buyers appreciate *quality* at consistent levels. Noticeably, in the current food chain, *quality* seems to be referring to freshness more than taste. The data shows that food buyers appreciate improved availability and quicker supply from local production.

Our study revealed that in general the food buyers expect the price of local produce to be cheaper than imports or at least at a competitive level, with the exception of certain seasonal specialties. Many respondents stressed that price needs to be very competitive on the Chinese food market and that most of the trade is price driven.

Place of origin and production conditions were less important to the respondents in the Chinese community. The value here is higher than in the other communities, because of a top rating given by an organic restaurant in the community. Removing this outlier would drop the value to 4.3, a value closer to the average of all three groups.

Shipping costs have a low score, most likely because food buyers don't import the food themselves instead they buy from distributors, who incorporate the shipping costs into the price.

Food Buyers

Community-owned grocery stores are the main source for specialty food items in the Chinese community. The grocery industry in this community is well established compared to more recent immigrant populations. In addition to the large number of independent grocery stores, there are several supermarket chains targeting the Chinese community. These stores have multiple (up to 6) outlets in the GTA. The main institution in the Chinese food retail sector is T&T Supermarkets. The chain, headquartered in British Columbia, operates 5 large stores in the GTA. It can be



SPECIAL: Organic Restaurant praising the local way

One of the restaurants we interviewed was a newer organic downtown restaurant that offers a blend of Chinese, South American, and Italian meals. In his responses the owner showed unusual awareness for local and sustainable food production, hence diverging starkly from other food buyers in the study. In the interview the owner promoted short supply chains "with lots of product knowledge". Furthermore he stressed that "[his] chief produce/meat buyer likes to show the clientele what 'real food' looks like [in order] to nurture the connection to local farmers".

best described as a Chinese version of Loblaws, offering similar floor plans, product assortment, and atmosphere.

Toronto offers a large number of Chinese restaurants with numerous regional specialties. There are a noteworthy number of vegetarian restaurants due to a substantial Buddhist community. Given the findings of our study, these restaurants might be more inclined to buy locally produced food products. Because of the size of the market and the number of people involved it is difficult to understand the complexity of the industry.

There are a number of processors in the Chinese community. The most common product developed was tofu. We were unable to obtain an interview with any processors in the community.

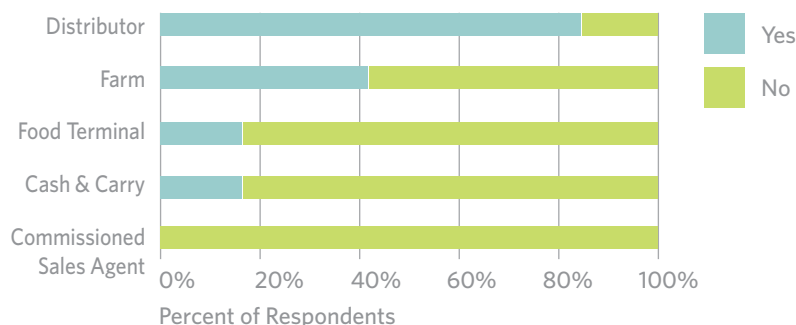
Produce market

Of the three ethno-cultural communities included in the study, the Chinese produce market is the most developed. The produce market is dominated by immigrants who started farming more than a decade ago, particularly in the Holland Marsh region. Chinese -Canadian growers are consistently present at the Ontario Food Terminal, where 5-10 growers can be found in aisle 200 at the farmers’ market on any given day. Some of the warehouse tenants at the terminal have an extended assortment of Chinese specialty vegetables, not including the ones that can already be considered mainstream, such as bok choy or nappa cabbage. Interestingly though, most of the specialty vegetable items on supermarket shelves in the Chinese community could not be found at the food terminal. Thus, it can be assumed that a significant part of the sourcing for specialty items does not involve the Ontario Food Terminal.

In the organic sector, we were able to identify a handful of local farmers providing Chinese vegetables. Ted Eng is a well established producer specializing in organic baby bok choy. During the growing season, other producers offer items like nappa cabbage, bok choy, cilantro or daikon. Some of the organic items are also available at the Ontario Food Terminal through an organic warehouse tenant and a local organic distributor in the farmers’ section, although in more limited quantities.

Distributors seem to be the most important source for food buyers in the Chinese community (see figure 6). The high share of respondents using distributors to source local vegetables can also be seen as an indication for a well-established distribution system, serving all sizes of food buyers.

FIGURE 6. SOURCING OF LOCAL VEGETABLES IN THE CHINESE COMMUNITY



The rather high level of sourcing directly from regional farms seems to be a consequence of the number of Chinese-Canadian vegetable growers already operating in Ontario. Some of the local growers have their own distribution in place, but we cannot specify how these volumes compare to the regular distribution channel.

As shown in Figure 6, the Ontario Food Terminal seems to be less important for sourcing food in the Chinese community. However, we encountered several trucks of local distributors and larger Chinese Supermarket operations at the food terminal, possibly because there are a relatively large number of Chinese growers at the farmer’s section and Chinese sales staff in the warehouses at the terminal.

Product Availability

Food buyers shared their perceptions of the most popular vegetables in the Chinese community. They also discussed food products that are not currently available and for which there is immediate demand. Due to the small number of respondents, the following list may not be representative of the total market.

FIGURE 7. MOST POPULAR FOOD PRODUCTS IN THE CHINESE COMMUNITY

Most popular vegetables	Most popular herbs	Top meat items
Choy Sum (Chinese Greens)	Cilantro	Pork (ribs, ground, flank, roast, loin, leg tip, feet, tenderloin, ham, belly, shoulder, bones, foot, hamhock)
Bok Choy	Garlic	Beef (hanger, skirt, shank, brisket, blade roast, ground, oxtail)
Chinese Broccoli (Gai Lan)	Ginger	Duck (breast, tongue, legs, feet, wings, whole, gizzard)
Chinese cabbage		Chicken (bones for stock, breast, whole, feet)
Shanghai Bok Choy		Pigeon (young, old)
Eggplant		Silky
Chinese Greens (Choy Sum)		Mallard
Shiitake mushrooms		Goose
Daikon		Yellow skin chicken
Baby Bok Choy		Quail
Potato		Rabbit
Green Onion		
Pea Sprouts		
Water Cress		
Chives		
Green beans		
Soy beans		
Snow peas		

FIGURE 8. LOCAL PRODUCTS DESIRED BY THE CHINESE COMMUNITY

Mushrooms (shiitake, straw, oyster, chicken leg, and other rare mushrooms)
Locally grown Chinese greens year round
Organic Asian greens
Also mentioned: watermelons, cantaloupes, apples
Watercress
Quails
Pigeons
Ducks
Dark skin chickens
Frogs

Meat market

The meat market is notable because there is a strong demand for off-cuts in the Chinese community, which gives farmers the opportunity to sell out the whole animal. It is more likely that meat processors catering to the community are able to sell off-cuts to Chinese retailers and wholesalers than prime cuts. These, in contrast, are more difficult to sell, because they are mostly sourced from high volume/low price distributors.

Opportunities

The local climatic conditions in Ontario allow for a range of Chinese vegetables and specialty items to be grown (Foodland Ontario 2007). The Chinese local food market is well-established but there is room for new products and markets. As one of the interviewed processors indicated, with an increased availability of organically/ecologically produced vegetables he would add organic options to his product portfolio. Growing health food departments and world crops in the mainstream grocery industry are going to have more processors looking for new sources of local vegetables. There is a small niche of high-end Asian restaurants that appears not to be supplied adequately with local specialty items.

This study was able to identify immediate demand for many specialty items including mushrooms, meat products such as quails, pigeons, ducks, dark skin chickens, and frogs. Overall, the Chinese market is still growing because of continued immigration and mainstream demand from Chinese specialty items is increasing.

Challenges

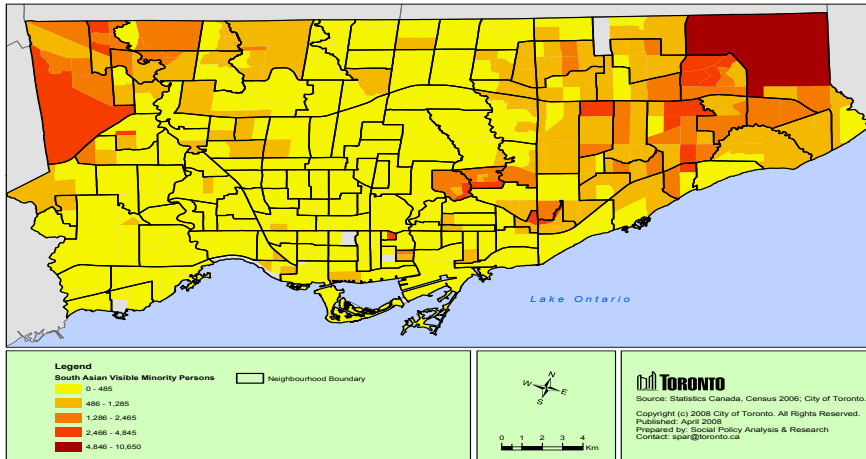
Although there is room for more local food in the Chinese community, there are some challenges that will need to be taken into consideration. Traditionally, Chinese supermarkets have very low price points, which make it hard for value added products (local, organic, etc) to compete on the shelf. Language barriers can also be an issue. Cantonese is the most common language among produce and meat buyers and in many cases communication in English is not preferred or possible.



Finally, existing business relationships between local growers and their clients could pose a barrier for new growers.

South Asian Market

FIGURE 9. POPULATION FIGURES FOR THE SOUTH ASIAN COMMUNITY



City of Toronto 2006b

Members of the South Asian visible minority group (Statistics Canada 2007b)

Toronto CMA/GTA 684,070

Ontario 794,170

South Asian immigrants in the CMA/GTA by place of birth (Statistics Canada 2007c)

India 77,765

Pakistan 37,285

Sri Lanka 17,425

Bangladesh 8,535

Recent South Asian immigration to Toronto CMA/GTA by place of birth, 2001-2006 (Statistics Canada 2007c)

India 77,765

Pakistan 37,285

Sri Lanka 17,425

Bangladesh 8,535

The Community

The 2001 census revealed that one out ten people in Toronto belonged to the South Asian community, making it the largest visible minority group in the GTA. The two main settlements (see figure 9) of South Asians in the GTA are Brampton and Scarborough. In some wards, the density of community members reaches up to 42 percent of the total inhabitants.

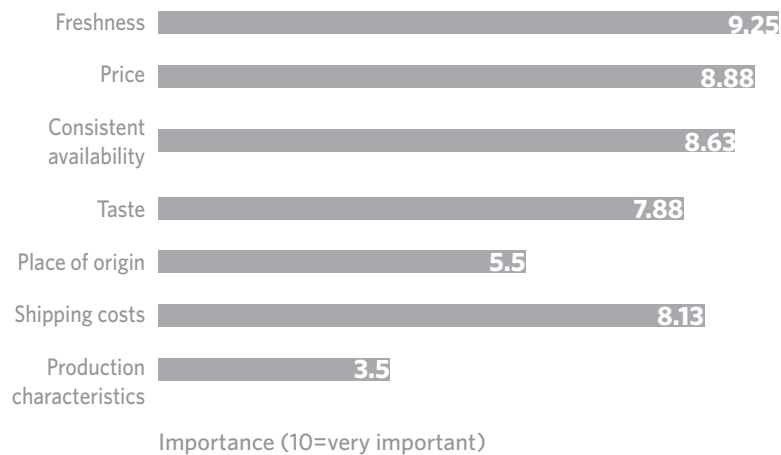
Its members form a very diverse group with different ethno-cultural, religious, and linguistic backgrounds. The community encompasses Bangladeshi, Bengali, East Indian, Goan, Gujarati, Hindu, Ismailia, Kashmiri, Nepali, Pakistani, Punjabi, Sikh, Sinhalese, and Sri Lankan immigrants. The main languages spoken are Punjabi (29%) and English.



The majority of immigrants from Pakistan, Bangladesh, or West Bengal are Muslim. Hence, one quarter of the South Asian community follow Halal³ dietary law. In addition, Tamils and Sri Lankan are mostly Hindu, who for the most part are vegetarian or do not eat beef. Finally, the Punjabi are predominantly Sikhs and many are vegetarian or do not eat beef (Tran et al. 2005).

South-Asians tend to have strong family ties, maintaining relationships with family members in their birth country. Similar to the Chinese community, traditions and ethno-cultural customs stay very important for the second generation of South Asians (Tran et al. 2005).

FIGURE 10. PREFERENCES OF THE SOUTH ASIAN COMMUNITY FOOD BUYERS



The South Asian community values freshness price and availability (see figure 10). Respondents said they were willing to pay reasonable prices for fresh products, but not above the market level. Production characteristics such as organic or no-spray are not highly valued.

Food buyers

The largest supermarket in the South Asian community is Iqbal in East York. There are many small to medium sized shops, some with two store locations. It is common for retailers to cater to more than just one ethno-cultural sub-group (e.g. to Indian and Pakistani customers) due to the population mix in the community. Often meat is sold in a meat shop in the strip mall rather than in the supermarkets.

During the study we got in touch with two companies selling their vegetables out of vans/trucks at locations with a high density of South Asian immigrants. While this method might provide an interesting channel for marketing local ethno-cultural produce apart from supermarkets, it should be noted that the price point of the produce sold out of trucks was considerably lower than most local producers could afford.

Due to recent inspections and competition concerns restaurant owners and processors were not inclined to give interviews. Therefore, little information is available about the sourcing of food products in these industries.

3. http://www.toronto.ca/health/pdf/nm_halal.pdf



Produce market

There are a few South Asian growers in Ontario and several of them sell their produce at the Ontario Food Terminal. One retailer has a close connection with two farms in Brampton. All food buyers in this group have bought or are still buying Ontario produce.

FIGURE 11. SOURCING OF LOCAL VEGETABLES IN THE SOUTH ASIAN COMMUNITY

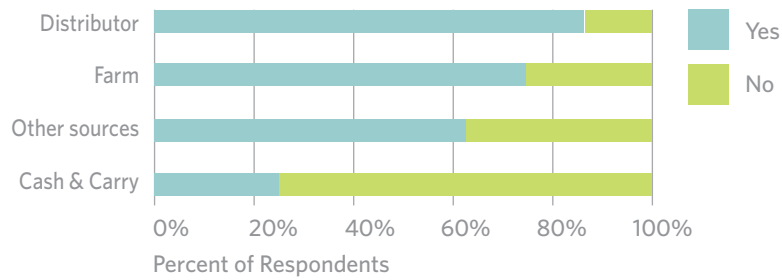


Figure 11 shows that food buyers in the South Asian community source their local vegetables mainly through distributors, although a significant share also buy directly from farms. Two of the larger supermarkets are in favour of sourcing directly and suggested that farmers get organized in co-ops in order to provide a more consistent supply. We assume that most of the other local food is sourced through the food terminal.

Product Availability

Food buyers shared their perceptions of the most popular vegetables in the South Asian community. They also discussed food products that are not currently available and for which there is immediate demand. Due to the small number of respondents, the following list may not be representative of the total market.



FIGURE 12. MOST POPULAR FOOD PRODUCTS IN THE SOUTH ASIAN COMMUNITY

Vegetables	Herbs	Pulses and legumes	Meats
Indian Okra	Mint	Whole black chanas (black chick peas)	Chicken (whole, ground, boneless breast, drumsticks, wings, breast, leg, leg with back attached)
Indian Karela	Methi	Whole moong beans	Goat (shoulder, leg, whole)
Indian Tinda	Cilantro	Chick peas	Lamb (leg, chop, whole, shoulder, stew cut)
Indian Arvi	Curry leaves	Whole lentils	Beef (stew cut, boneless, lean/regular ground,
Potato	Bay leaves	Moong dal	Fish (best cut for frying)
Eggplant	Ginger	Kidney beans	
Cauliflower		Yellow lentils	
Pakistani Kaddu		Black lentils	
Indian squash (Round and Long)		Urad dal	
Onion		Dal channa powder	
Fresh Green Peas			
Chapan Kaddu			
Lokey			
Spinach			
Tomatoes			
Beet Roots			
Carrots			
Green Pepper			
Cabbage			
Cucumber			
Fresh corn			

FIGURE 13. LOCAL PRODUCTS DESIRED BY THE SOUTH ASIAN COMMUNITY

Curry leaves	Methi	Bay leaves
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Grains, beans, and pulses market

Pulses are very significant in South Asian cooking. Chickpeas and chickpea flour, kidney beans (rajmah), and black-eyed beans (lobia) are more popular in the north of India, pigeon peas and urd (black matpe), Mung bean in the south (Foreign Agricultural Service 2004).

In 2003, Canada was exporting 220,000 tonnes of pulses to India (Foreign Agricultural Service 2004). At the same time shop owners in the GTA source their pulses and beans from India or Pakistan. Pulses are either imported in individual packages or as bulk items that are then repackaged by the grocers. The majority of pulses seem to be supplied by local traders/repackers. It seems that there is opportunity to divert some of the pulses that are currently exported to local retail outlets.

Meat market

As shop owners and managers were reluctant to share information, we could only identify two meat suppliers through the survey. However, since most Supermarkets cater to both Indian and Pakistani customers, it is assumed that they will carry some Halal products. Additional meat processors and distributors could be identified by the Ontario Ministry of Agriculture, Food, and Rural Affairs lists of licensed sheep and goat processing plants. Although Muslims adhere to Halal dietary law, according to Ehsan Sairally, a Halal coordinator for the Islamic Society of North America, Muslim consumers are “big meat eaters”.

Opportunities

The retail sector in the South Asian community seems to be a good fit for the output of small and medium sized farms. There are a decent number of two-shop grocery retailers and many of these shop owners have experience with direct supply.

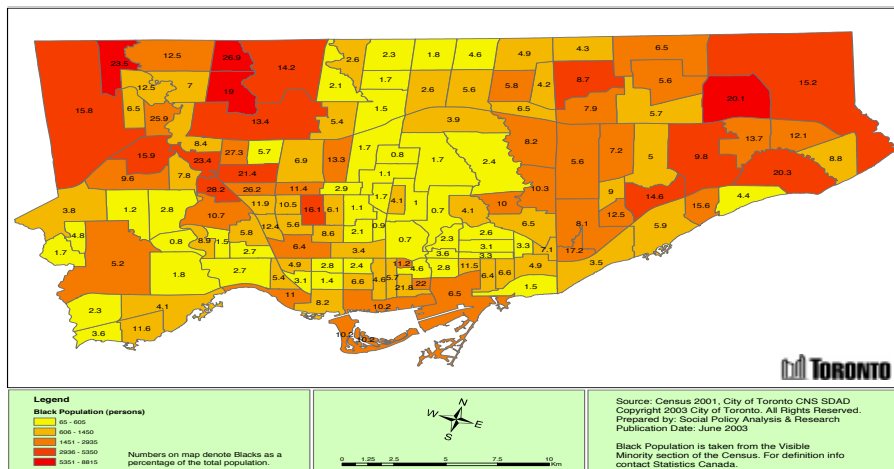
Respondents reported freshness and quality problems for imported goods, particularly during winter. There were also reported problems with pesticide residues, fungicide contamination, and other agro chemicals for imports of South Asian vegetables (Dhall and Dhatt 2002). This may mean the market is ready to explore some local options. The price of oil has increased shipping costs over the past year and is expected remain for the next two years (IATA Economics 2007). As indicated by our findings, this increase in shipping costs is noticed by the shop owners and may be another reason they are ready to consider more local sources of food products.

Challenges

The cost of goods from South Asian countries is still extremely low, despite rising transportation costs. This will make it difficult for local producers to compete on price. In our study it became clear that information about market access is very difficult to access. Thus it is harder to estimate the potential for locally produced items.

African-Caribbean Market

FIGURE 14. POPULATION FIGURES FOR THE AFRICAN-CARIBBEAN COMMUNITY



City of Toronto 2006c

Members of the Black visible minority group (Statistics Canada 2007b)

Toronto CMA 352,220
 Ontario 473,765



African-Caribbean immigrants in the CMA/GTA by place of birth

(Statistics Canada 2007d)

Caribbean and Bermuda	15,925
Africa	25,900
Western Africa	7,730
Eastern Africa	10,660
Northern Africa	4,420
Central Africa	1,605
Southern Africa	1,475
Ontario	411,090

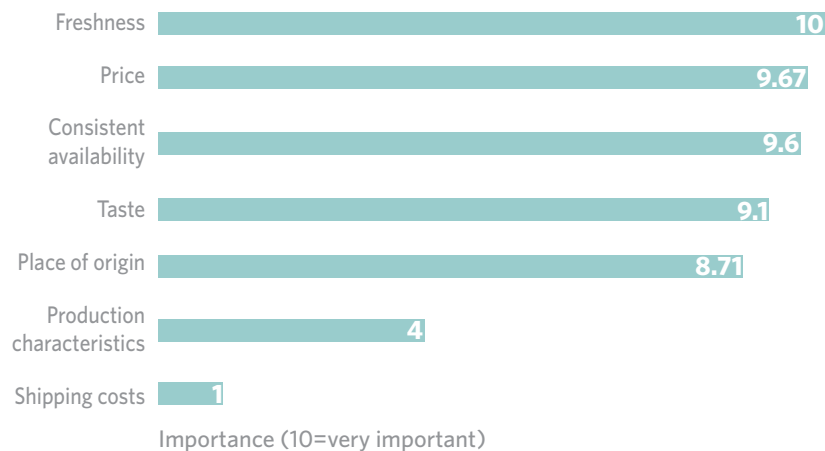
The Community

The majority of African-Caribbean immigrants living in the GTA were born outside of Canada and immigrated within the last two decades. As a result, community members' average age and income is below the total Canadian average (Lindsay 2001). Figure 13 shows that the population of African-Caribbean immigrants is more scattered than the Chinese and South Asian Communities but there is a concentrated population living in the Northeast and Northwest neighbourhoods.

There is a significant share of Muslims in the African-Canadian population (22%), which is significant for the Halal dietary law. The Muslim faith group can be found in North Africa (Morocco, Algeria, Tunisia, Libya, and Egypt), the Sub-Sahara (Mali, Nigeria or Senegal) and East Africa (Somalia, Eritrea, Djibouti and Sudan).

Most of the survey respondents in the African-Caribbean group were members of the Caribbean community which has strongly influenced the results depicted in the study. Our study showed that Caribbean immigrants are very dedicated to their country of origin. As a consequence, some food buyers purchase from Jamaican distributors in order to support farm families from their homeland. "What about farmers back home in the Caribbean" was one of the concerns raised, when talking about locally produced food with our interviewers.

FIGURE 15. PREFERENCES OF THE CHINESE COMMUNITY FOOD BUYERS



As shown in figure 15, freshness is the most important issue for food buyers in the African-Caribbean community, especially since most of the vegetables come in



containers from the Caribbean. One of the respondents addressed this problem, by saying he “buy[s] some [vegetables] from Canada because many times the [imported] food comes off the plane, then stays in the airport for another 20 hours. It looks displeasing”.

Given the average income within the community, it was not surprising that price was considered to be important. Food buyers expect good prices, however, they have a fair price in mind and believe in sharing profits with farmers. The excellent growing conditions in the Caribbean result in good quality food products, which create high standards for quality and taste. “Certain things I would buy wouldn’t matter if they are imported. But there are many specialty foods that have to be imported [because of the] taste and smell”.

In order to get these products from countries like Jamaica, the interviewed retailers spend \$1,500-2,500 per month on container shipment. This doesn’t seem to be reflected in the low score for shipping costs (see figure 15). Yet, because of the high number of missing values for this question, the average value should be used with precaution. The score of the place of origin (8.7) is relatively high, compared to the Chinese (5.3), and South Asian (5.5) results. Evidently, food buyers (and their customers) in the African-Caribbean community have little interest in paying more for value-added vegetables at the current moment. Despite the average response, some respondents (during further discussions) said they would like to know that produce is grown in healthy soil with sound farming practices, they want to know whether pesticides are used, and want to make sure it really comes from Ontario farmers.

Food Buyers

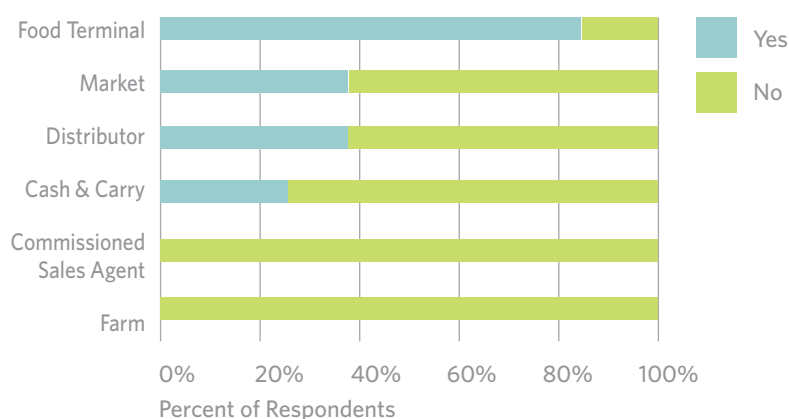
Together the Danforth Food Marts and Nicey’s Supermarkets have 10 outlet locations making them two of the largest food retailers in the African-Caribbean retail market. Although they were coined the “Loblaws for Afro-Canadians” by a community member, their dimensions are well below the big box supermarkets. In addition there is a large number of small to medium sized independent shops as well as a handful of farmers’ markets.

Toronto offers numerous African-Caribbean restaurants, from simple take-outs to fine restaurants downtown. A few of these restaurants are also specialized in catering, especially for many of the African-Caribbean festivals.

Produce market

The climatic difference between the Caribbean and Ontario is more striking than for the Chinese and South Asian community. This means that there is less potential for growing niche crops here. Many of the commonly used vegetables (carrots, onions, potatoes, peppers, or spinach) are already being sourced through mainstream channels.

FIGURE 16. SOURCING OF LOCAL VEGETABLES IN THE AFRICAN-CARIBBEAN COMMUNITY



Distributors do not play a strong role in the African-Caribbean community. Shop owners prefer to select the produce themselves at the food terminal or at markets (cash and carry, farmers’ markets, etc). It was unclear if shop owners send commissioned sales agents (jobbers) to do their purchasing as the term “jobbers” was not necessarily familiar to them. None of the interviewed food buyers are supplied directly from local farms.

Product Availability

Food buyers shared their perceptions of the most popular vegetables in the African-Caribbean community. They also discussed food products that are not currently available and for which there is immediate demand. Due to the small number of respondents, the following list may not be representative of the total market.

FIGURE 17. MOST POPULAR FOOD PRODUCTS IN THE AFRICAN-CARIBBEAN COMMUNITY

Most popular items:		
Onion	Spirit Weed	Beef (salted, oxtail, cow tail, steak)
Green pepper	Basil	Goat (head)
Red pepper	Babar	Chicken (breast, leg)
Kallaloo	Sweet Cicely	Pork (tail)
Carrots	Allspice	Pear
Cabbage	Thyme	Yellow yams
Tomato	Mint	Yellow split peas
Plantain	Kidney beans	Green split peas
Okra	Black eyed peas	Green peas
Potato	Pigeon peas	Green beans
Lettuce	Lima beans	Barley
Cocoyam	Congo peas	Broccoli
Pumpkin	Long beans	Cauliflower
Sweet yams	Whole wheat	Corn
Green onion	Lentils	

FIGURE 18. LOCAL PRODUCTS DESIRED BY THE AFRICAN-CARIBBEAN COMMUNITY

Cocoyam	Ginny	Mango
Yams	Pineapple	Sugar cane
Ackee	Plantain	Bananas

Meat market

The meat market is notable because there is a strong demand for off-cuts in the African-Caribbean community, which gives farmers the opportunity to sell out the whole animal. Traditionally, meat in the Caribbean is seasoned with jerk spice, a



blend of spices including allspice and hot pepper. Many African-Caribbean supermarkets carry jerk spiced meats, in addition to a variety of salted and smoked meats also popular in the African-Caribbean community.

Opportunities

We can conclude from the survey that the quality of imported food is not satisfying the African-Caribbean community which could provide an opportunity for local growers to showcase the freshness and quality of local products. Store owners said they would expect vegetable items to be less bruised, fresher, and in better condition when grown locally. Some shop owners also expressed interest in local ecologically produced food. Ontario farmers will have to assure food buyers, that buying from local farms will give them more control over the production methods than imported food.

Challenges

One of the strongest objections to buying local is the commitment to their own community and homeland. The Caribbean community in particular was showing strong economic and emotional ties to their homelands. Importing goods thus is regarded as a way of supporting farmers and their families in their home countries. Food buyers are also concerned with quality and will only buy if a product that looks and tastes like it came from their home country. One way to overcome these challenges is to encourage community members to get involved in farming here in Ontario. The other major challenge is difference in growing conditions between the Caribbean and Ontario. More research and experimentation is needed to discover what and how products can grow here.

Conclusion

This exploratory study conducted among retailers, restaurants, and processors was designed to examine the food supply chains for three selected ethno-cultural communities in the GTA. Information was gathered about the **sourcing** of specialty items, including the distribution channels used and the suppliers involved. **Attitudes** towards buying local and **experiences** with buying directly from farms were explored.

Through interviews with food buyers from within these communities we determined the **most popular items** for the vegetable, herb, pulse, and meat markets. In addition food buyers were asked for product needs and service requirements and were able to identify items with **immediate demand**. The study identified important **participants** and their **locations** (see appendix 1) for each market category. In addition, demographic information available from the City of Toronto was used to determine the most populated neighbourhoods. In all three communities, researchers found it challenging to gain access to the restaurant and processing industries. Therefore, much of the information presented here is based on food buyers for retail establishments.

Overall, freshness was the number one factor that food buyers consider when making purchases. Price and consistent availability were also important to food buyers in all three communities. Production practices and place of origin were only considered important when the top three requirements were met first. Most food buyers sourced products through distributors and the Ontario Food Terminal. Food buyers in the Chinese and South Asian communities bought a significant amount of products direct from Ontario farms. The Caribbean community also bought direct from farms but the farms were located in their home countries rather than Ontario.

Chinese Community

The Chinese market is a very established market and members of the community own most parts of the supply chain. It has a diverse retail industry supplied through a well-developed distribution system. A significant number and volume of vegetables

are already being produced in Ontario. There is, however, room for growth in the local market. Specific areas of demand include year-round greens, mushrooms, and poultry. Barriers to entering the market include language, competitive price level, and existing business relationships

South Asian Community

The South Asian market shows strong potential for expanding local and direct production and distribution. There are many locally owned small and mid-sized retailers that are willing to develop business relationships with local producers. Specific areas of demand include pulses, herbs, and off-cut meat products. Barriers to the market include competition with low prices from imports, although rising oil prices are becoming a concern.

African-Caribbean Community

The African-Caribbean community (mainly Caribbean) will be the most challenging market to develop locally. The strong ties to farmers in the Caribbean and the climatic differences create strong barriers to local markets. There is some opportunity to develop a local supply chain in some capacity. Encouraging community members to become involved in the farming and distribution networks would be an important aspect. Festivals are an important component of the African-Caribbean community and the food vendors at the festivals provide a good access point to food buyers in the community.

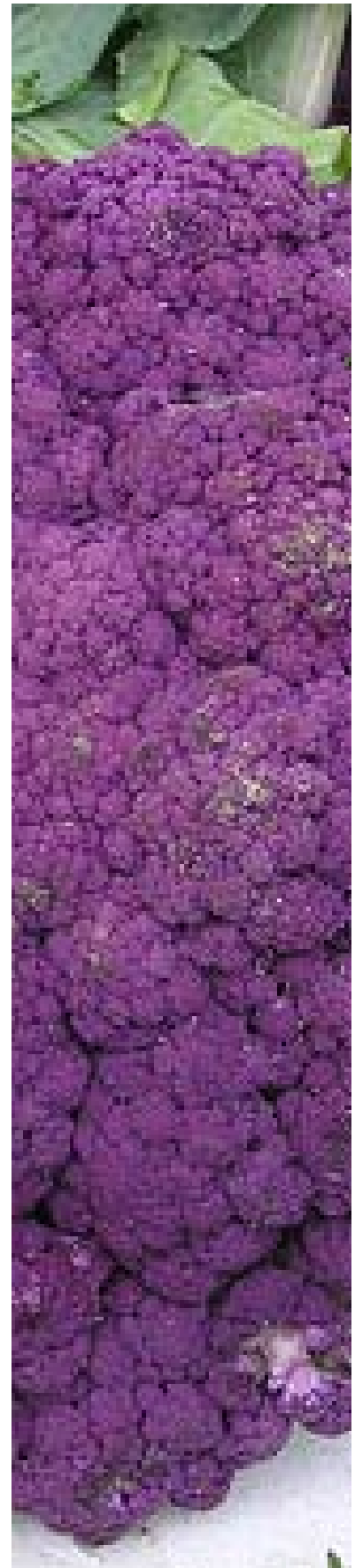
Recommendations

There are plenty of opportunities for developing new markets for the ethno-cultural communities in the GTA. This report has highlighted some specific areas of demand and purchasing preferences in the Chinese, South Asian, and African-Caribbean communities. For all three communities there are some issues to take into consideration when considering developing new markets and supply chains.

It is important to **take cultural background into consideration**. Language and culturally specific customs can make developing business relationships a challenge. Learning about the community in the intended market can improve this process. It can also be helpful to get communities members involved from an early stage of development, either through employment or in an advisory capacity. Getting feedback from food buyers in the community is invaluable to developing strong market relationships.

Understand the community and food buyer preferences. Freshness and price were important factors to everyone who was interviewed. Currently these factors are considered more important than value-added products or specific production practices. These preferences should be taken into consideration when developing a business strategy. Consistent supply is also a top concern. Several food buyers suggested forming co-operative selling strategies to ensure adequate supply.

There are always **niche markets** that will desire specialty products, specific production practices, and certifications. In the Chinese community there is a demand



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ethno-cultural food markets in the GTA

for organic production, and in the other two communities there is a demand for Halal certified meat products. In all three communities, meat products offer a significant opportunity for local market development. Research market opportunities and demand thoroughly in each community before developing a business strategy to capitalize on a specific demand.

Future Directions

From our survey we have learned the structure of the supply chains used in each community, but there is a need for more comprehensive information. The following is a list of further research that would be beneficial to farmers entering the market:

1. Assessing the volumes of products in each supply-chain will provide an accurate understanding of which products are in demand and those that are already produced in sufficient numbers.
2. Tracking the evolution of the market volumes in the mainstream and specialty grocery supply-chains will allow producers to make educated decisions about product development.
3. Assessing price fluctuations for specialty items over the year will assist producers in developing accurate price points for their products.
4. Incorporating appropriate analytical techniques and adding new census data will improve the accuracy of the results.

This was a preliminary study designed to clarify the current situation and explore areas for further study. The sample sizes used in each of the communities are not representative of the total markets. A quantitative survey would be better suited to estimate market volumes and potential and thus to reduce uncertainties for growers new to the market. There is also a need for an in-depth analysis of the restaurants and processing markets because this study was unable to include many of these types of respondents.



Appendix 1. Community Participants

Chinese Community

Retailers interviewed

Oriental Harvest - 310 Spadina Ave., Toronto

Sunny Meat Market - 327A Spadina Ave., Toronto

Asian Foodmart Spadina - 247 Spadina Ave., Toronto

Restaurants interviewed

Rice Bar - 319 Augusta Ave., Toronto

Graceful Vegetarian - 7131 Kennedy St. East, Toronto

Processors interviewed

Richard Yau (Tai Hu) - Guelph, ON

MannaRich Foods - 26 Laidlaw Blvd., Markham, ON

Producers/Farmers Discovered

PRODUCE TRADED AT THE TERMINAL:

Good year Farm, ON (distributed by H&S Quality Products)

Lee Chum Produce, ON

Best Asian Farm, Queensville, ON

Blue River Farm, Zephyr, ON

Vankempen Farm: bok choy

Delbec, Aymler ON: white and green bitter melon

Holbourne Farm: Shiitake

GROWERS/DEALERS PRESENT AT THE TERMINAL:

Happy Chung Farm, Hornby ON

Chow's Farm, ON

Green Valley Farm, ON

Plus others unidentified

ORGANIC VEGGIES:

Green Fields Farm

Ed Dirse

Plan B Organics

Ted Thorpe

Zephyr Farms, Ted Eng

RIGA FARMS - Bok choy and other ethno-cultural produce.

Festivals

Chinese Lantern Festival, Dim Sum Chinese Festival

South Asian Community

Neighbourhoods

Gerrard India Bazaar - Gerrard St. E. & Coxwell Ave. Toronto

Danforth and Donlands - (Pakistani)

Brampton

Malton

Rexdale

Markham

Scarborough - East End

North York

East York - Thorncliffe Park Dr.

Richmond Hill

Retailers

Thiara Supermarket - 1965 Britannia Rd. West, Unit 4, Mississauga

Asian Food Center - 1075 Ceremonial Dr., Mississauga, ON

Iqbal Food Corporation - 2 Thorncliffe Park Dr., Toronto, ON

Indian Punjabi Bazaar - 499 Ray Lawson Blvd., Brampton, ON

Restaurants

Shardas Indian Cuisine & Sweets - 735 Twain Ave., Mississauga, ON

Indian Flavour - 4700 Keele Street, Toronto, ON

Processors

Asian Sweets & Restaurant - 7148 Airport Rd., Malton, ON

Brar's XPreSS - 2646 Islington Ave. Toronto, ON

Festivals

Festival of South Asia, Ramadan & Eid-UI-Fitr (End of Ramadan)

African-Caribbean Community

Neighbourhoods

Kensington Market

Kipling Ave. & Finch Ave. W, Etobicoke, ON - West African

Bloor St. W & Ossington Ave. Toronto, ON - East African, Ethiopian, Somalian

Dixon Rd. and Rexdale Blvd. Etobicoke, ON - Somalian

Brampton - African-Caribbean

Newmarket - African-Caribbean

Eglinton Ave. W & Oakwood Ave. York, ON - Caribbean

Yonge and Bloor - Jamaican

"Village" - St. Clair Avenue and Bathurst Street - Jamaican

"Jungle" - Lawrence and Bathurst - Jamaican

Retailers

Caribbean Corner - 171 Baldwin Street

Cactus Exotic Foods - 1911 Finch Avenue

Retailers (continued)

A&G West Indies Food Store - 2597 Eglinton Avenue West

Caribbean Island Food Store - Jane and Finch Mall

Restaurants

Raps Restaurant - 1541 Eglinton Avenue West.
416-782-raps

Tinnels - 2517 Eglinton Avenue West, 416-657-0108

Montego Jerk - 1 York Gate

Town Talk - 2641 Eglinton Avenue West

Processors

Ethiopian Spice - 160 Baldwin, Unit 7,
Kensington Market

Patty King Bakery - 187 Baldwin St. Toronto,
416-977-3191

Festivals

Afropfest, Caribana, African Village Festival,
Harbourfront, Bana Y'Afrique

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