A Wealth of Food:
A Profile of Toronto's Food Economy

A Profile prepared by the Toronto Food Policy Council
277 Victoria St. #203, Toronto, Ontario, M5B 1W2
Telephone: 416-392-1107
Fax (416)-392-1357
E-mail: tfpc@city.toronto.on.ca

January 1999

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1.0 Introduction

This paper highlights an undervalued economic sector that creates major economic synergies. The urban food economy is defined here as food system economic activities taking place in and near urban areas. Unfortunately, too many cities ignore the role of food in their economy, environment and society. A historic exception is the 1929 book by W.P. Hedden, Chief of the Bureau of Commerce of the Port of New York Authority[1], *How Great Cities are Fed*. In it he discusses many of the transportation, distribution, marketing, processing, health and waste management issues involved in moving food into cities.

Hedden's work has rarely been updated, however Philadelphia, a major East Coast food growing, food distribution and warehousing centre has done studies on the impact of its food economy. Ten years ago it was estimated that the food economy employed from 20-25% of the workforce of the Delaware Valley region, generating $21 billion in direct local revenues and five billion in payroll[2]. These statistics include almost $500,000 in sales from local farms.

The Toronto Food Policy Council believes that the food system is important to the new City of Toronto in many ways, not the least of which is its role in the regional economy. The food economy here is a stable, successful sector. The food sector in the City employed 117,135 persons in 1996, representing 10% of all employment. These citizens worked in 10,798 places of business making up 14% of the City's total business establishments. Toronto plays a significant role on a national scale in the food economy.

This profile is a factual outline of the strength of this sector. We should consider the food economy as an important pillar of the new city's economic development. We must have a good understanding of inter and intra sectoral linkages and an eye for possible future economic opportunities, linking, for example, the food processing sub-sector upstream to the strong hospitality industry and downstream to the near-urban farm belt.

1.1 How to Read this report

We have arranged this profile report primarily by sub-sectors of the food economy and concentrated on the former Metropolitan Toronto. In an effort to reflect the changes occurring with the amalgamation of seven municipalities into one, we have used the term "New City of Toronto" to cover the area of the seven municipalities in the former Metropolitan Toronto (York, East York, North York, Scarborough, Etobicoke, Toronto and Metro itself).

Because our economy is so linked with the Greater Toronto Area (GTA) we will also refer to this unofficial political designation that includes the New City and the surrounding regions of Peel, Durham, Halton and York. The 1996 population of the GTA was 4.66 million, divided almost equally into 2.35 million in the new City of Toronto and 2.31 million in the regions surrounding it[3]. For a synopsis of the food economy in the Greater Toronto Area please refer to Appendix A.

2.0 The Structure of the City of Toronto's Food Economy

In the new City of Toronto, the food economy's portion of total employment has remained relatively stable over the past decade. In percentage terms it has increased slightly from 9.5% of the total in 1986 to 10% in 1996[4].

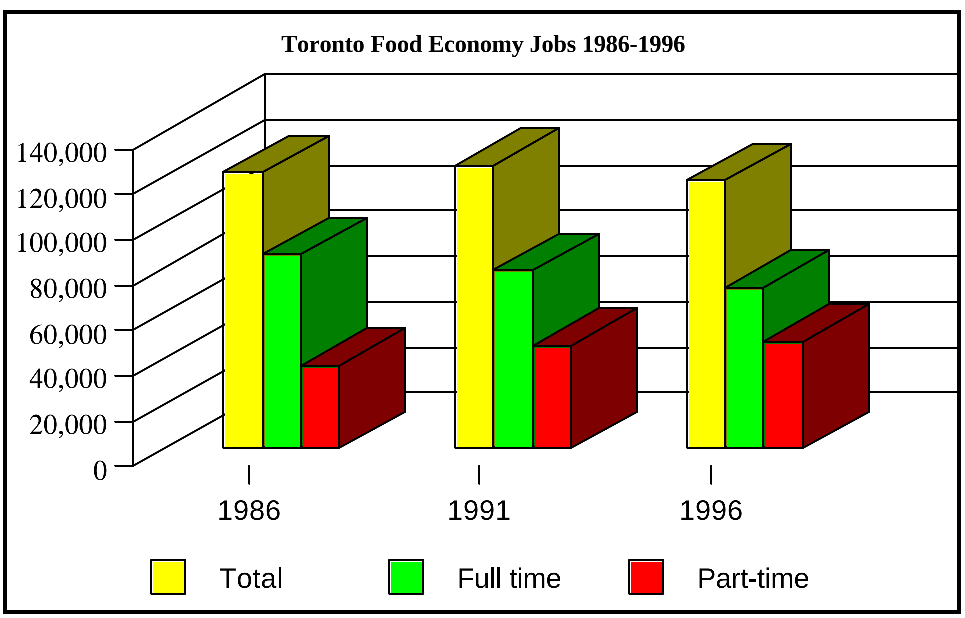
Table 1
CITY OF TORONTO FOOD SECTOR EMPLOYMENT BY SUB-SECTOR, 1996

Sub-Sector	Employment	% of Total Employment	Number of Establishments
Restaurant and Food Service	61,217	52.2%	6,172
Food Wholesaling and Warehousing	5,566	4.7%	318
Food Retailing	31,632	27%	3,947
Food Processing	18,532	15.8%	361
Total	**117,135**	**100%**	**10,798**

Sources: Metro Employment Database, 1996

Three major sub-sectors, Food Service, Food Retail and Food Processing, contribute 94% of all food sector jobs. Table 1 shows the present number of firms and employment levels by sub-sector in the new City of Toronto.

Figure 1



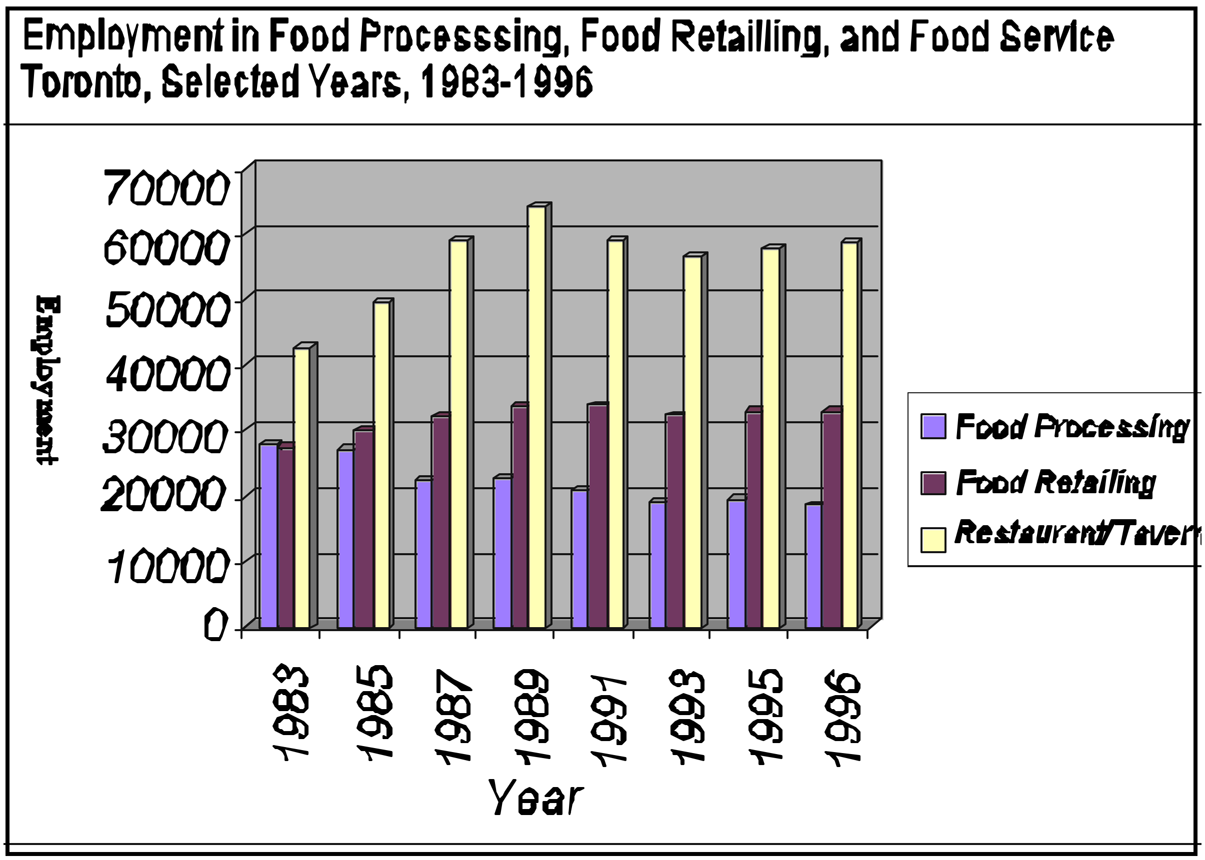
Sources: Metro Employment Survey, 1996

Figure 1 reveals that part-time jobs in the food economy have increased from 29% to 39% in just 10 years. This is nearly twice the rate of growth of the general Toronto economy, which has only 21% part-time employment.

Toronto's economy has undergone major restructuring in the last fifteen years and this is reflected in the changes and shifts in food economy sub-sectors. Although employment in the sector is stable, in 1983 the food retail and food processing sub-sectors had the same number of jobs. Since that time, food retail jobs have increased and food processing jobs have declined.

Considering Figure 2, food service has had the most employment, over half of the sectoral workforce, and the highest variability of the three during the past 15 years. We suspect that this sub-sector has many part-time jobs and that the rate is increasing. We will discuss changes and trends in food economy sub-sectors in more detail below. We begin with a key sub-sector, food processing.

Figure 2



Source: Metro Toronto Planning Department Employment Surveys 1983-1996

3.0 Food Processing: An Industrial Powerhouse

Food processing, also called food manufacturing, is an extremely important economic sub-sector with major potential to contribute to the long term growth of the City. It has one of the highest economic impacts of all types of manufacturing activity and is strategically linked to other economic sectors including tourism, biotechnology, packaging, environment, resource recovery and advertising. The high concentration of value-added food processors provides excellent links to suppliers and/or customers throughout the entire food sector. The City is fortunate to have the largest concentration of food processing firms in Canada, characterized by a wide variety of goods being produced[5]. Below are statistics providing an indication of where the city and region stand in the Canadian food processing sub-sector.

- The City of Toronto has 18,532[6] food processing jobs, accounting for 12% of total Toronto industrial employment, making it the largest industrial employer in the new City[7]. This industrial activity takes place in 361 establishments.

- In 1995, food processing jobs represented 10% of all jobs in the Canadian manufacturing sector, making it the third largest manufacturing industry in the country[8].

- One in every four manufacturing jobs in Ontario is in the food processing industry[9]. Forty-five percent of all processed foods in Canada are produced by Ontario-based companies, making it the Province's second largest manufacturing sector.

- At least 56.2% of all food processing in Ontario takes place in the GTA. It is the second largest manufacturing sector in the GTA, with over 600 firms employing over 40,000 people. The GTA has 36.3% of Ontario's population.

- Food exports from Ontario have doubled during the last five years and now exceed $5.3 billion in 1997[10]. Over 80% of these exports are value-added compared to the Canadian average of 43%[11].

- Based on the average national food processing industry remuneration rates, Toronto's food processing payroll was $605,749,851 in 1996[12].

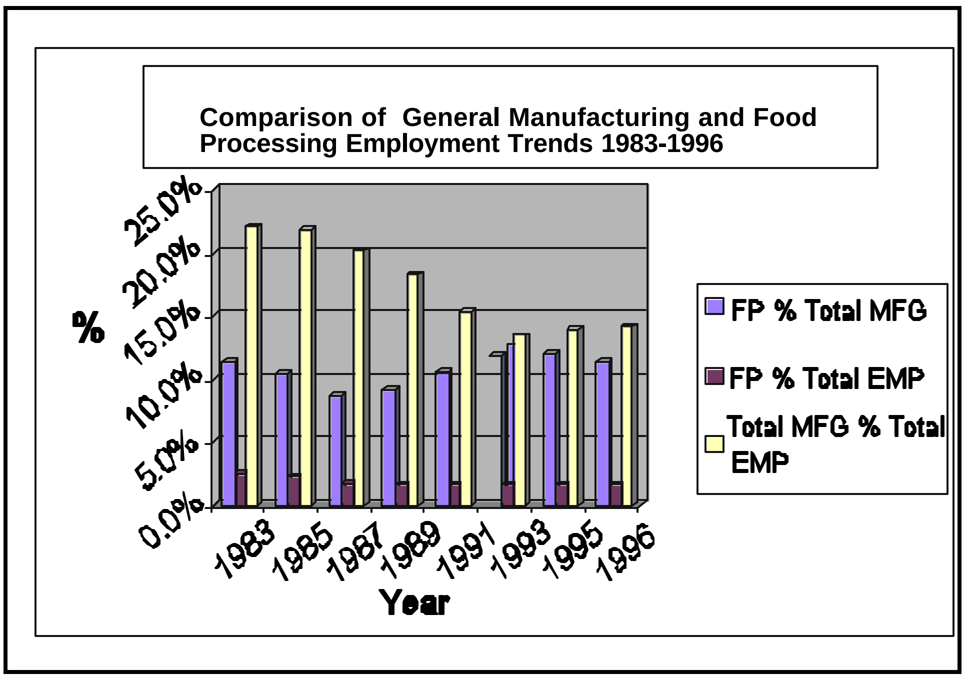
Harvard economist Michael Porter believes that "Nations succeed not in isolated industries, however, but in clusters of industries connected through vertical and horizontal relationships"[13]. There are a number of distinct areas of the New City where food processing operations have clustered. Meric Gertler has identified three significant areas. The first is located in South Etobicoke in the general vicinity of the Ontario Food Terminal. The second is located around Toronto's historic Stockyards district near Keele Street and St. Clair Avenue West. The third is located in North York between Weston Road and Dufferin Street[14].

3.1 Food Processing Employment

Food processing activity in the City of Toronto has been affected by the changing general economy, but not as much as other sectors. Figure 3 shows that the general manufacturing sector's share of total Toronto employment has slipped from above 20% to below 15% in the last fifteen years. Although manufacturing jobs in all sectors (except food processing) declined from 244,782 to 145,210 in the previous decade, a decrease of 41%, employment in the food processing sector only declined by about 16%. About half of this historic decrease in food processing can be attributed to the closure of the Maple Leaf factory in the Old Stockyards. Other

factors contributing to lower employment levels in this sub-sector include the impact of the recession, the replacement of labour by mechanization, plant relocations, and closures among some of the other large firms[15].

Figure 3



Source: Metro Toronto Planning Department Employment Surveys 1983-1996

Despite this decline, food processing employment has varied between 8-12% of Toronto's total manufacturing employment since 1983. During the last few years, a number of large companies such as Redpath Sugars, Canada Bread, and Nestle Canada have made substantial new investment in their operations. This implies that the employment levels in some of the larger plants will continue to remain relatively stable over the next few years. Recent work undertaken by the Metro Labour Education Centre further supports this. Total employment across these larger plants did decline, largely due to a process of capital reinvestment and/or expansions in capacity. Of the 17 firms surveyed, six had increased their employment levels between 1991 and 1995, three had remained unchanged while seven had experienced employment losses. One firm (Toronto Poultry Products) had shut down completely. The study concluded that the majority of the companies evaluated are very likely to remain and very few were seen as being at risk of closing or leaving[16].

In considering the impact of small food processing firms on food processing employment, we suspected that there might have been an undercount of the totals. Table 2 details businesses inspected by the municipal health department, not by the federal or provincial authorities. Here we found an estimated 522 additional jobs in this moderately well paying industry in the former City of Toronto alone. We have not included these numbers in the food processing job totals but want to illustrate how the sub-sector is even stronger than it appears on paper[17].

Table 2 SELECTED CITY OF TORONTO PUBLIC HEALTH INSPECTED FOOD PROCESSING ESTABLISHMENTS			
Type of Establishments	**Number of Establishments**	**Av.# of food handlers per Establishment**	**Estimated number of direct jobs**
Food processing plants[18]	42	9	378
Processed meat manufacturing plants[19]	36	4	144
Totals	78	13	**522**

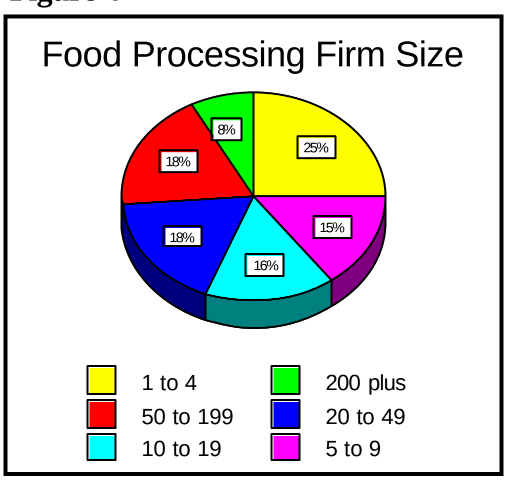
Source: Public Health Division, Environmental Health Services Establishment Database, City of Toronto, 1997.

3.2 Firm size

Seventy-five percent of all Toronto food processing firms have under 50 employees. Only 8% of the firms have over 200 employees. Small and medium sized enterprises currently comprise a disproportionately large share of total firms in the food processing industry, and this size profile has held steady since 1994[20]. It appears that the majority of the new firms in this growing sub-sector tend to be relatively small and are the result of new company formation rather than relocations from other jurisdictions[21]. Small and medium size firms are developing significant niche markets for value-added specialty food products.

Toronto is also home to large domestic and multinational firms such as Maple Leaf Foods, Olson's, Nestle and Campbell's which are producing products for all of Canada and for export. Large firms comprise a relatively small percentage of the total number of food processing firms in Toronto, but they account for a considerable amount of employment. Seventeen food processing firms surveyed in 1995 by the Metro Labour Education Centre counted for almost 4,000 jobs, or just over 20% of total food processing industry employment in the new City of Toronto.

Figure 4



Source: Toronto Region Business and Market Guide 1996/7

The survey concluded that the majority of these firms were likely to remain in their present location. Only one firm expressed plans to move. With few exceptions, all firms had reconfigured their in-house operations between 1991 and 1995 either through technological change or additions to capacity. Generally, employment losses occurred in those plants that had experienced technological change either through streamlining their production process, or through recent investments in capital equipment. Employment gains on the other hand occurred in plants that had increased production levels, either through an increase in capacity or through the acquisition of redundant production from other branch plants during parent firm restructuring. Only one firm posted employment gains after having recently invested in machinery [22].

3.3 Economic Multipliers

Economic multipliers are used to gauge the total impact of new economic activity, such as the number of new jobs or in income levels generated by new investment and include the direct investment in the industry as well as spin-off spending. Private businesses and public services want to know accurate estimates of the number of jobs that will be indirectly created so they can plan accordingly. Each type of industry has a different multiplier number and this number will be further modified by the size of the economy it is situated in. Sophisticated economic analyses are applied to each industry in each case, to determine the number of indirect jobs that new activity will bring.

For example, a multiplier of 1.5 applied to 100 new jobs will be calculated as 100 x 1.5 = 150. Minus the original 100 jobs = 50 indirect jobs provided. This is sometimes referred to as the ripple effect. What interests us here is that the multiplier values for food processing are among the largest in all industry. "The income multipliers for food processing are at least twice as high as those in such important US manufacturing industries as pharmaceuticals, concrete, steel mills, televisions, motor vehicles, aircraft and many others. Food Processing also has a higher average multiplier than nearly all the other food related industries[23]."

The USA national income multiplier for food processing was 3.81, versus an average multiplier of 2.56 for all manufacturing. These figures are national-level multipliers and caution must apply in using them on a municipal level. Provincial multipliers are lower than national multipliers and municipal ones are lower still. The danger of assuming multipliers from larger jurisdictions is that not all of the indirect or induced economic effects fall within the City of Toronto.Below is a summary table of employment shifts, industry multipliers and basic organizational changes in the 17 large firms referred to in the last section. In Table 3, note that the Canadian national multiplier values are given beside specific firms. There is quite a range of values, from 6.9 for cooking oil production to 1.42 for the bakery industry.

Table 3
LARGE FOOD PROCESSORS IN TORONTO AND YORK

Company Name	Change 1991-1995	Employment Multiplier	Reasons Given for Employment Change between 1991-1995
CANAMERA FOODS	(-56%)	6.9	Technical improvements in production, moving packaging to Oakville
DEMPSTERS BREAD DIVISION	(0%)	1.42	Plant survived major restructuring of parent division, now serving its immediate market
CENTRAL BAKERY	(-14%)	1.42	Production streamlining, recently invested in expansion of facilities and updated machinery
PRIME POULTRY PRODUCTS	(+40%)	2.55	New production lines and production transfer from other plants
NEILSON CADBURY	(+35%)	1.65	Increased production, manufacturing of many product lines
WESTON BAKERIES	(-32%)	1.42	"Captive"client - Loblaws. Reasons for change unknown
REDPATH INDUSTRIES	(+7%)	1.63	Increased production, new products. Recently announced investments to increase capacity
NESTLE CANADA	(-41%)	1.65	Technological change, production restructuring, machinery updated and expanded
COCA-COLA BOTTLING	(-2%)	2.79	Recent capital investment. One of the plants remaining after national restructuring of Parent firm.
TORONTO POULTRY PRODUCTS	(-100%)	2.55	The Dodds plant will close. Reasons not commented on, perhaps due to duplicate capacity
JANE PARKER BAKERY	(-33%)	1.42	Technological change. Products sold at A&P. Financial state of parent company unclear, stock prices down 15% last year.
SPECIALTY BAKERIES	(-13%)	1.42	None given
SILVERSTEINS BAKERY	(+25%)	1.42	Increased production; increased hiring. Stable in spite of ownership battles
RYDING REGENCY MEAT PACKERS	(0%)	2.59	None given. Secondary sources point to stability, negotiating first contract with the union
QUALITY MEAT PACKERS	(+20%)	2.59	Increased production. Expressing ideas of moving. Has duplicate capacity in Brampton.
TORONTO ABATOIRS	(0%)	2.59	Expressed ideas of moving, possible zoning impacts
WINGS FOOD PRODUCTS	(+50%)	1.98	Increased production, new products and clients. Recently invested in machinery.
Total Firms Surveyed	(-2%)		Overall trend of employment loss expected to continue.

Source: The Food Sector in Toronto and York, Metro Labour Education Committee. Early Warning System Pilot Project, 1995.

4.0 Food Retail

Toronto food retail stores come in many different formats, from convenience stores to large warehouse-style emporiums. Green grocers dot commercial retail strips in the central core. Complimenting these are ethnic specialty retail strips, drugstores, department stores, gas-bars and others increasing their share of the food dollar[24]. The presence of the Ontario Food Terminal helps support Toronto's green grocers, with access to reasonably priced wholesale food. There are also 11 farmer's markets, including the downtown St. Lawrence Market North. Employment in food

retailing rose noticeably, from 27,265 in 1983 to a peak of 33,544 in 1989, and since it has remained generally constant at approximately 31,000 jobs. Table 4 compares employment figures by retail categories.

Table 4
TORONTO FOOD RETAIL STORE TYPES, NUMBERS AND NUMBERS OF EMPLOYEES

Type of Store	Number of Stores	Number of Employees
Supermarket	423	17,222
Speciality	1,775	8,398
Convenience	1,691	4,940
Other	158	1,072
Totals	**3,947**	**31,444**

Source: Metro Employment Data Base (MED) 1996.

Toronto's food retail system functions better than that of many USA cities, which often lack food retail stores in their central or low-income areas[25]. Even though Toronto has a wide range of food retail choices, there are gaps in service in the food retail system. For example, in a 1990 survey, 18% of Central Area residents said that access to supermarket service needed to be improved. In 1998 a new Loblaws opened in Harbourfront and a Dominion store has located in East Downtown and these stores could help fill food retail gaps. A study of Northwest North York has shown that this suburban low-income area does not have a dearth of food retail stores, although citizens without cars for transportation can have problems accessing food. This lack of mobility is similar to the situation in the downtown for low income citizens, but with the suburbanites facing much more difficult treks to get to the grocer[26].

Our Canadian mix of public policies has generally helped preserve intact, mixed-income, liveable neighbourhoods in the central city. Supermarkets locate there to serve higher-income customers and prevent competitors from establishing a base. Currently Toronto's policy of encouraging mixed-income neighbourhoods is at risk as a result of present senior government economic policies. Food retail locations that serve the lowest-income citizens could be threatened by this lack of investment in housing and income supports. (Please refer to the TFPC Discussion paper
7, Food Retail Access and Food Security for Toronto's Low-income Citizens for further discussion of these issues).

5. 0 Food Service [27]

In Toronto, Food Service employs 61, 217 people representing 52.2% of all employees in the food sector[28]. The vast majority of workers in this sector prepare and serve food on-site in restaurants, either sit-down or fast food types . Other food service premises include mobile food vendors, large caterers, private clubs, child-care centres and assisted living centres.[29] Table 5 presents a breakdown of food service establishments by category and number of employees.

Table 5
TORONTO FOOD SERVICE BUSINESSES BY TYPE, NUMBER, AND NUMBER OF EMPLOYEES

Type	Number of Establishments	Number of Employees
Restaurants & Taverns	3,039	33,096
Fast Food (& Drive-Ins)	2,914	22,325
Refreshment & Entertainment	90	1,078
Accommodation and Trade Services	129	4,718
Totals	**6,172**	**61,217**

Source: MED, 1996

The former City of Toronto (central city) had slightly over half (52.2%) of all food service establishments in the former Metro in 1996. This in itself represents a quarter of all food economy jobs in the entire food sector.

6.0 Food Warehousing and Food Wholesaling (Food Distribution)

Total food warehouse employment in New Toronto is 2,110[30] in 80 food warehouse depots. Food wholesale employment is 3,456 jobs in 238 establishments. If we add these two categories together, we get a total of 5,566 employees working in 318 establishments.[1]

One contribution to the vigour of this sub-sector is the central wholesale depot, the Ontario Food Terminal, governed by a Board appointed by the Ministry of Agriculture, Food & Rural Affairs (OMAFRA). The Terminal is used by supermarkets for 15% of their purchases, is a near exclusive source of supply to green grocers, and is an important supplier to specialty stores. The Terminal is one of the largest North American imported produce wholesalers and has a summer Farmer's Market where Ontario produce is sold wholesale.

[1]The stated difference between these two sub-sectors is that warehouses would store food and wholesalers would sell food. In practice we believe that there is some overlap between these two sections of the food economy (and indeed between all sub-sections). While companies are not counted twice in the MED database, they sometimes play economic roles as both warehousers and wholesalers. Food distribution might be another way to characterise this sector.

7.0 Conclusion

We should not forget the economic ramifications of the food sector. At least ten percent of all jobs in the City are based in this sector. Food processing is the largest manufacturing industry in the city and has withstood market changes and a severe recession. The size of Toronto's economy makes a it a natural corporate headquarters and food manufacturing and distribution centre. The Ontario Food Terminal is one of the largest fresh produce entrepots in North America. Toronto's food retail sector outperforms that of most North American cities and employs many in good jobs. Our food service sector is very large and it fuels the tourism\hospitality sector. Toronto is a destination for fine dining. Small food processors, restauranteurs and speciality retailers alike focus on quality. The tremendous cultural diversity of Toronto lends itself to experimentation to fill specialty niche and ethnic markets. Toronto's food economy connects all these sub-sectors in a powerful web that adds value at each step[31]. There is a wealth of food, but also much food wealth in Toronto.

APPENDIX

A. The Food Economy in the Greater Toronto Area

The food economy has been growing throughout the GTA. In the 1990's. The total number of food industry firms increased 10.5% between 1991 and 1995[32]. Table A show a comparison of the structure of the food economy between the City and the rest of the GTA by sub-sector. It should be noted that within the Greater Toronto Area, the City has a significant concentration of the area's food processing and restaurant/food service firms. The table also notes the recent rates of growth in food sub-sectors and all grew healthily, between 10-20%, in the recent recession period. A quick comparison of individual companies by name between the City and the rest of the GTA shows that many of the largest employers had operations in both areas.

Table A
COMPARISON OF FIRM LOCATION BY SUB-SECTOR AND GENERAL GROWTH RATES

Food Economy Sub-Sector	Toronto	GTA	Toronto Firms as a % of GTA	Rate of Business Growth 1991-95
Processing Firms	391	651	60%	10.5%
Retailing Firms	*4,147	3,170	NA	13.4%
Wholesaling Firms	318	1,432	22%	20.4%
Restaurants, Food Service	5,929	7,854	75%	20%
Total Firms	10,798	13,107		

Food Economy As % of all Businesses	14%	10.5%		

Sources: Metro Employment Survey, 1994, Board of Trade Business and Market Guide. * This shows number of locations. One firm may have multiple locations, i.e., Loblaws.

Table B is an overview of the large multi-national and domestic food firms that are headquarted for Canada in the GTA. They are ranked by their revenue count in the FP 500.

Table B
MAJOR GTA BASED HEADQUARTERS IN THE FOOD AND BEVERAGE INDUSTRY

	COMPANY	1995 RANK BY REVENUE
1.	George Weston Ltd.	6
2.	The Oshawa Group Ltd.	21
3.	McCain Foods Ltd.	39
4.	Maple Leaf Foods inc.	49
5.	The Molson Cos. Ltd.	63
6.	Great Atlantic & Pacific Co. Of Canada	65
7.	Kraft Canada Inc.	77
8.	Ault Foods Ltd.	121
9.	Cott Corp.	122
10.	Nestle Canada Inc.	137
11.	Coca Cola Beverages Ltd.	158
12.	Nabisco Ltd.	160
13.	Beatrice Foods Inc.	165
14.	Campbell Soup Co. Ltd.	291
15.	Redpath Industries Ltd.	347
16.	Ralston Purina Canada inc.	360
17.	Cadbury Beverages Canada Inc.	398

Source: Financial Post 500 Annual Survey, 1996

B. GTA Agriculture

Agriculture is said to employ 1% of workers in the GTA, in comparison to 5% of all Canadians. It is the region, not the new city, that has significant agricultural productivity. The City of Toronto has 21 Farms and 6 food production businesses with a total of 93 jobs. The Table C includes the GTA farm economy. The region lost 850 farms between censuses, but total farm cash receipts rose from 391.8 million in 1986 to 425.5 million in 1996[33].

Table C
AGRICULTURAL STATISTICS FOR THE GTA, 1986-1996

	Number of Census Farms		Area of Census Farms (acres)		Area of Crop Land (acres)		Total Farm Capital Value (million)		Total Cash Receipts (million)	
	1986	1996	1986	1996	1986	1996	1986	1996	1986	1996
Halton	834	720	118,805	109,187	74,584	77,584	471.4	777.4	97.1	129.3
Peel	824	689	129,476	120,026	89,267	84,009	515.2	1,101.1	50.7	77.7
York	1,391	1,211	210,604	193,686	136,740	131,647	787.1	1,790.5	86.2	170.4
Durham	2,218	2,001	358,168	336,357	217,910	212,910	844.4	1,550	157.8	208.1
Total GTA	5,267	4,621	817,053	776,404	518,501	505,360	2618	5,200.6	3,91.8	426

ENDNOTES

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2. Koppel, R. "Agenda for Action: the Impact of Food, Horticulture and Agriculture on the Economy of the Delaware Valley" **Philadelphia Food and Agriculture Task Force**, 1988.

3. Board of Trade of Metropolitan Toronto, **Business and Market Guide** 1997.

4. Key Facts, **Metropolitan Toronto Planning Department**, 1992.

5. Benham, Kyle. Economic Development Division, **City of Toronto**, pers. communication, 1998.

6. Metro Employment Database (MED) categories 422 (5,091) and 431(13,441)**Metropolitan Toronto Planning Department**, 1996.

7. Gertler, M. "Industrial Activity in Metropolitan Toronto: The incidence of clusters and network relations", **Research and Information Services, Planning Department**, Municipality of Metropolitan Toronto, 1996.

8. Statistics Canada, "Canada's Food Processing Industry", 15-515-MPE 1996. Food processing represents 1.9% of total Canadian GDP. Canada imports $8.1 billion of processed food products and exports $8.2 billion for a slight trade surplus. In 1995 food exports rose to 19% of food processing industry shipments, up from 14% in 1990.

9. Ibid. In 1995 Ontario had 42% of all food industry shipments and had the most food processing employees 74,000 (40.5%) of Canadian total, a percentage which is greater that Ontario's 36.7% share of national population.

10. Tobin, B. "Winners And losers as free trade turns 10", **Farm and Country**, Dec. 16, 1997.

11. Canadian Farm Manager, "Export goal requires new mindset" **Canadian Farm Management Council**, Ottawa, ON, Fall, 1998

12. Statistics Canada, op. Cit., In 1995 the average Canadian hourly paid food processing industry employee earned $29,851 per annum. Salaried employees made 38% more or $41,194. There is an average national industry split of 3 hourly paid industry employees to 1 salaried employee in food processing.

13. Porter, M. <u>The Competitive Advantage of Nations</u>, **The Free Press**, New York, 1990.

14. Gertler, M. op. cit.

15. Lorius, A., An economic development strategy for the food processing industry in the City of Toronto. Urban Planning Programme, **University of Toronto**, March, 1998.

16.The Food Sector in Toronto and York,Early Warning System Pilot Project, **Metro Labour Education Committee**, 1995.

17.The impact of 522 jobs brings in an additional $18,043,086 in payroll into the central Toronto economy.

18. Toronto Public Health Division, Environmental Health Services Establishment Database, City of Toronto, 1997. The former City inspects 42 food processing plants but chose 24 plants to determine the average number of food handlers

19. Ibid., The former City inspects 36 processed meat plants but chose 30 plants to determine the average number of food handlers.

20. Ibid.

21. Benham, Kyle, Economic Development Division, **City of Toronto**, pers. communication, 1998.

22. Lorius, op. cit.

23. Conner J. & Schiek, W., Food Processing: An Industrial Powerhouse in Transition. **John Wiley and Sons**, New York, 1997.

24. "Annual Market Survey", **Canadian Grocer**, June, 1996.

25. Weinberg, Zy, No Place to Shop, **Center For Food Policy**, Washington, D.C., 1995,

26. Lipski, U. & Uetrecht, C. "North York Food Security Watch", North York, 1995.

27.Statistics Canada, Total Food Service Sales, Canada 1996. Food Service is a large industry employing 8% of the Canadian population, and contributing 4.3% of GDP in 1996, estimate- $29.3 Billion, food service captures 36% of total food sales in Canada vs. 44% in the USA.

28.Catering food service businesses fall both within Refreshment& Entertainment and Accommodation and Trade Services (e.g., Skydome, CaraFoods) MED classifications.

29.City of Toronto, Community Services, Div. of Public Health, EHS. 1996 Establishment and Activity Statistics, part one.

30.Op cit., Metro Employment Data Base (MED)1996.

31. With contributions by Kyle Benham, Economic Development Division, **City of Toronto**

32. In the Toronto Census Metropolitan Area (CMA).

33. Office of the Greater Toronto Area., <u>A Vision for the Countryside</u>, **Report of the Provincial - Municipal Countryside Working Group**, Group established 1991.