

Healthy Food & Beverage Sales in BC Public Buildings

Industry Meeting 2008-05-28

PROCEEDINGS REPORT

9:00 a.m. – 2:30 p.m.

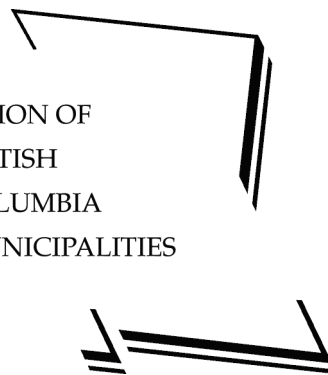
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Background

The Healthy Food and Beverage Sales in Recreation Facilities and Local Government Buildings Initiative hosted a meeting to engage the BC food industry and its support systems in making the sale of healthy food and beverages easier and more accessible. Input was provided by staff from the School Guidelines Support Initiative and Healthier Choices in Vending Machines in BC Public Buildings.

BC now has three healthy food and beverage sales (HFBS) initiatives which reflect a worldwide trend for healthy food and beverages prompted by disturbing chronic disease projections and associated spiraling health care costs. The new guidelines and programs create business opportunities for food producers, processors and distributors in BC in meeting what will be growing demand in this province, and beyond our borders. Industry is a key strategic partner in realizing the success implementation of the HFBS initiatives for example in providing healthy snack, food and beverage product options that meet the provincial guidelines.¹



¹ MRFEAT is the acronym for the Municipal Recreation Food Environment Action Toolkit

NEW POLICIES AND PROGRAMS IN SUPPORT OF HEALTH

Health promotion and disease prevention professionals have been strong advocates for a healthy balanced diet as part of healthy active living for a long time, but formal policies have been slow to evolve. In the last several years, policies have been developed in BC to support the sale of healthier food and beverages in schools and provincial public buildings. More recently, there has been a focus on local government buildings and recreation facilities to ensure consistency with the goals of promoting healthier lifestyle choices.

The goal is to make healthy food and beverage choices widely—and predominantly—available for purchase where people live, work and play. This new approach is built on a collaborative partnership between government, industry and outlets that are engaged in the sale of conveniently accessible foods and beverages. As a starting point this includes schools, recreation centres, and local and provincial government buildings.

THE FOOD AND BEVERAGE INDUSTRY GETS MOVING

Not surprisingly, the food and beverage industry has been quick to respond to changing consumer needs, desires and expectations. As consumer health concerns surrounding healthy eating, healthy diets, obesity and other social trends gain momentum, many food and beverage producers and suppliers have developed new products and marketing campaigns to support “the healthy choice”.

Thanks to this development, it has been easier than ever to offer the healthier choice. For example since 2005, BC schools and districts have made considerable progress towards eliminating unhealthy choices from school-based food and beverage sales. However, a recent report from the Ministry of Education found that schools face significant challenges in eliminating “not recommended” snacks from vending machines due in part to the fact that the healthy snack market is not yet as mature as the healthy beverage market. Suppliers are looking to source new products that meet the guidelines. Producers and processors of products that meet the guidelines are looking for ways to reach their market.

Context in Brief

The design of the meeting with industry utilized various strategies to solicit input from members of the food industry. An on-line survey was a first step in this process. To assist with the overall marketing, communications positioning and implementation of initiatives and resources related to the Healthy Food and Beverage Sales (HFBS) in Community Recreation Facilities and Local Government Buildings, the BC Parks and Recreation Association (BCRPA) undertook a stakeholder survey.

The survey found that a strong majority (82.5%) said "The provision of healthy food and beverage alternatives for sale" should be encouraged while two-thirds (67.9%) agreed it is "Just the right thing to do". Respondents stated that the most important aspect of the HFBS project was "To promote healthy eating for active living". In the food and beverage industry, a strong majority (80.0%) said they are currently providing and/or promoting the availability of healthy choices to their clients while 10.0% said they are planning to take action in this area and 10.0% said they are not taking any active steps.

Key informant interviews were another tactic used to gather input for design of a facilitated session. Ten people were interviewed to capture insights and recommendations on how to best organize the meeting and its content to meet industry needs and expectations.

On May 28, 2008 the BC Recreation and Parks Association hosted an industry information meeting attended by a cross section of industry—producers, processors, distributors—and government program and ministry representatives, with 29 participants in total.

The meeting focused on the opportunities and challenges in implementing healthy food and beverage sales programs and policies in BC public buildings.

The day was comprised of two main components:

- The opportunity to learn about the healthy food and beverage sales initiatives, their activities across the province, and the resources they have available for industry.
- Facilitated discussion on how BC businesses can meet this opportunity, what will be required, and what some next steps may be.

This meeting with a representative cross section of stakeholders together in one room was planned with the following goals in mind:

1. The food industry is aware of and informed about the new **HFBS guidelines** and initiatives
2. The food industry is aware of the new **opportunities available** to them through the new HFBS guidelines

Product Ingredients

The policy of rounding up (e.g. less than 200 mgs) may mean a product doesn't meet the guidelines in contrast to language such as "less than or equal to". Several participants noted that this small wording change can make a significant difference to their products meeting the guidelines.

Changing Implementation Timeframes

One participant shared that advancing the timing on the HFBS guidelines for schools from the fall of 2009 to fall of 2008 made months of sourcing and marketing work redundant, and didn't allow time for replacement products to be sourced and incorporated into the supply chain. Such timeframe changes come at high cost for suppliers.

3. The food industry is aware of **resources available** to them, such as the Brand Name Food List.
4. The HFBS initiatives establish a **pro-active relationship with industry**
5. The HFBS initiatives **broker relationships** between individual food industry businesses, organizations and industry development supports.

In addition, HFBS program managers gained valuable input for refining and implementing the HFBS initiatives to better collaborate with industry.

DISCUSSION HIGHLIGHTS (BY PARTICIPANT SELECTED CATEGORIES)

The input highlighted here comes from four main sources: ten key informant interviews prior to May 28th, 2008, participants' notes from small group conversations, facilitator notes on the final large group discussion, and one-on-one conversations during the day.

Of the many ways to organize this information, this section is based on themes that emerged from priorities identified by participants. Specifically after the networking and small group portions of the meeting participants were asked to identify the one or two points that they saw as most important in implementing healthy food and beverage sales programs and policies. These were clustered and the themes named by the facilitator. The themes were then verified by the participants as fairly reflecting all key priorities.

1. Early involvement of industry

Industry participants expressed a desire to be engaged in the development of policy at the earliest possible point in the process. There are numerous areas where industry believes they could provide positive feedback and help create clear, easily implemented policies—policies which could be brought into effect in a timely way.

OTHER POINTS:

- Business has the will to supply healthy food & beverage products and many businesses (processors, distributors and retailers) are already leading the way in this area
- Large multinationals and Canadian Grocers are already committed to supporting healthier eating—they see where the public preferences are moving—the writing on the wall.
- Business has input on how to facilitate implementation of the policies in the "field."

E.g. feedback on industry response if policy compliance is mandatory or voluntary.

- Timeframes for implementation of policy guidelines need to be

Industry— Healthy Eating partnership success story

Based on the BC School Fruit and Vegetable Snack Program there are real opportunities for the food and beverage industries—both producers and processors.

Food and beverage companies may not have large increases in sales directly through the government sponsored program but they do see increases through indirect sales (parent's shopping/buying habits affected).

There is an opportunity for partnerships with off-site retailers to create dedicated healthy food & beverage displays, thereby establishing a different PLU category, which allows suppliers to track spin-off sales.

longer, allowing businesses to respond in cost effective (viable for business) ways. This means ensuring adequate time is allowed in policy roll-out for business to adjust products and product lines to meet the guidelines and to generate new product options.

- It is critical to get the message out to business well in advance of policy implementation so that they can plan and prepare.
- What are ways to support timely and effective communication with vending machine companies—both about the guidelines and resources, and for their input into policy development and implementation?
- Address issues of business planning and investment cycles. Industry asked, “What is the BC Government's committed investment timeframe relating to the HFBS policies and programs and how does that relate to the time it takes to recoup exceptional costs related to new equipment purchases, new packaging and new product development?” Business will buy-in much more quickly when they see a match between the timeframe they need to comply with the guidelines and the timeframe of the commitment from Government.
- Involve the entire range of the affected business community. In the case of Healthy Food & Beverage Sales this might include: growers/farmers, producers, manufacturers, re-packagers, distributors, retailers, vending businesses and institutional-concession food managers/purchasers.
- Small and medium sized processors have different concerns from the nationals/multinationals. A thorough understanding of what business (across the sector) needs in order to fully engage with these policies and program can support their willing compliance, and can support industry development in the province.
- What can government do to support BC-based small to medium sized enterprises?
- Offering insight into how to create the most attractive environment in order to guarantee eager business participation in new policy initiatives. A huge issue here is the level playing field, whereby all food services on a given site comply with the same policy guidelines—See Level Playing Field, below.
- How can government and business develop partnerships to achieve mutual goals relating to healthy eating?

2. Synergy

There is a desire, with both HFBS program managers and business representatives, for a more coordinated and cohesive approach to BC's healthy food & beverage sales initiatives. Better partnering and linking can minimize time/resource wasting duplication, and maximize opportunities for synergy and collaboration.

Participants also seek better coordination and synergy with other government initiatives such as provincial policies to support the 100 mile diet and community economic development, and national policies on trans fats and sodium.

Participants' Ideas for Synergy

Link to Health Canada's Food Safety programs/ personnel – as a channel for getting HFBS information to small scale food producers.

Seek synergy in penetrating schools, institutions, hospitals, private homes, re healthy eating habits and healthy choices.

Look for ways to include independent schools.

How to coordinate with school districts?

Work Place BC might be a great partner as HFBS is part of workplace wellness.

In addition to awareness and supply there are also important structural issues. For example there is a need for lunch rooms in some government buildings. Where staff do not currently have dedicated space for eating lunch they are less likely to bring (healthier) food from home and more likely to go out for fast food or to eat while working at their desks.

OTHER POINTS:

- Better ongoing communication between existing and new programs helps reduce confusion.
- Different guidelines for individual provinces may result in poor response by large corporate business.
- Synergy is nurtured by triple bottom line approaches—for example, Eating healthy is good for you, good for the environment and good for the economy.
- Promoting synergies means bringing different players together.
- Seek consistency across provincial ministries in policy development.
- Contradictory mandates and policies across ministries are putting barriers in place.
- It's important to look at the broader question of eating healthy and healthy lifestyles if the goal is really to have Canada's healthiest populace.

3. Distribution/volume as a barrier to implementation

A key challenge to supplying healthy food & beverages across the province is distribution. This issue is made more complex by the perishable nature of many of the HFB offerings and by the need for specialized and refrigerated storage and transportation.

Large scale food distributors (Neptune, Sysco) currently handle only products which roll-over with sufficient frequency and volume. There are no small scale distributors capable of servicing the entire province. This can make it very difficult for food service managers and vendors to cost-effectively source and deliver foods which meet the HFBS guidelines.

OTHER POINTS:

- Provincial vs. national mandate—it is difficult to create large scale change when BC is a small player in the global landscape. Harmonization of HFBS guidelines across the country would create a market of sufficient size to spur production, packaging and distribution of products.
- Larger food and beverage manufacturers, that typically supply food service distributors, are focused on national and international markets. These companies are actively pursuing healthier alternatives, but are focussed on meeting national requirements and timeframes rather than BC requirements that represent a relatively small market.
- However, less than 1% of BC processors are large (defined as over 100 employees). The vast majority of BC processors are small (approximately 75% have less than 50 employees). What large manufactures would view as a small market may be a huge opportunity for smaller BC processors. Most BC processors can easily adapt to change, however they lack the resources, infrastructure and access to technology to keep on top of new requirements, reformulate, market and distribute healthy new products.

Suggestions regarding Distribution

Harmonization of guidelines across the country would enable both national/global industries and small businesses to expand markets. This would create an environment for new product development.

Facilitate partnerships between vendors and processors.

Local manufacturers may be better able to respond to a BC-only market but they often need help gearing up to serve that market.

Need to increase volume and address low volume transportation.

Social Marketing

"The HFBS initiatives are really social marketing – like getting people to reduce salt intake; it's a big job."

The guidelines provide healthy options but cannot force people to buy them.

Reposition messaging from "it's healthy" to "it's cool" – for example, eating breakfast

- Small scale suppliers noted that distributors will not carry a product with insufficient volume or consumer demand.
- Distribution is key. When you can find products, the next challenge is to source and distribute at economically feasible costs. There is a need for better prices for healthy food and beverage options.
- Vendors need more "Choose most" food options. There is good availability of healthy beverage options, but not enough healthy food options that meet the guidelines.

4. Product codes and sourcing information on the Brand Name Food List

There was high praise from most business participants for the Brand Name Food List and at the same time most felt it would be even more useful if food products were identified by their universal product code (UPC) and included supplier and manufacturer contact information. These changes would make it easy and efficient for vendors and food service managers to not only identify HFB's but to then proceed with placing an order.

OTHER POINTS:

- Identifying BC-based food producers and processors would support triple bottom line synergies.
- There needs to be greater awareness of the existence of the BNFL, both for vendors/food service managers, and for producers and processors who can benefit by listing their products.

5. General public awareness

Both HFBS program managers and business representatives see getting the message out to the public as an essential part of making these initiatives viable and successful.

There was general agreement that government resources could be invested in a provincial marketing campaign in support of making healthy eating and healthy lifestyles the preferred choice.

Creating strong demand for healthy products makes it more viable for industry to invest in product development and distribution infrastructure. In general, "demand pull" strategies are more efficient and effective than "supply push" strategies.

OTHER POINTS:

- It is unclear how successful Influencing food choices through promotion of the Canada Food Guide have been—but the speed of change that is possible when food and beverage choices become "cool" is tremendous. "Make the change the cool thing to do."
- Unlike subsidies and grants to industry, a HFBS communications campaign does not risk raising trade agreement issues.

because you're smarter and more productive.

Find spokespersons/ champions.

Package Labeling

Some participants asked, "Who reads labels [on food and beverage products]?" There was a general sense that nutritional information provided may not be meaningful to the average person.

Create simple, trusted identifiers, and make more use of the Daily Recommended Intake.

- Cross promotions can be effective—e.g. connect sports and academic excellence with healthy eating.
- Power of messaging can be greatly increased through partnerships.
- Helpful to seek synergy with messaging within or across agency(s).
- For triple bottom line benefits, it's helpful to promote local food choices. At the same time it's important not to create confusion between healthy and local—they are complimentary rather than exclusive
- Define terms: e.g. Healthy choices; Local; and 100 mile diet
- Use branding like the former BuyBC program and tie this into healthy eating.
- Educate institutions to insure long term sustainability of the programs. E.g. Cafeteria food service managers are likely to be in place longer than the HFBS programs.
- Education of parents, students, teachers, food service managers and other stakeholders is important. This would include a component aimed at educating parents of school children about what the changes involve, why they have come about and what benefits a healthy diet offers. This should include focus on average families.
- Act Now could be a powerful tool for increasing public awareness.

6. Consistent long-term funding

BC business is more likely to make large scale investments when they can see a matching level of commitment from government. Currently no one represented at the meeting was aware of government funding for the HFBS initiatives stretching beyond 2010.

OTHER POINTS:

- There needs to be consistency and long-term commitment for these policies and programs from government matching the business planning and development cycle. This is particularly true where HFBS changes require major infrastructure development, like refrigerated vending machines, trucks and warehouses.
- There may be additional costs related to the production and distribution of products that meet the guidelines. This means profitability is lower for vendors and therefore institutions and organizations hosting vending machines. Compliance with the guidelines could result in vending machine contracts that are unable to pay host agencies as well as they have in the past. There is a need to recognize and respond to the implications for schools, recreation centres of the possibility of a reduced income stream.

7. Support for product development

Creating new products and reformulating existing products to meet provincial guidelines presents a range of challenges for business.

Industry expressed a desire for guidance and support given that BC currently leads the nation in healthy food and beverage policy initiatives. Being at the forefront means there is a small market and few existing resources, products or facilities to support quick implementation.

Industry deems themselves willing to develop products and supply the HFB market, but this needs to be an economically viable option.

OTHER POINTS:

- There can be a significant up-front costs/investment for developing or reformulating products.
- Guideline requirements may change with little or no notice—presenting further challenges to industry.
- Few BC producers have access to facilities for developing and reformulating products.
- BC is the only province in Canada that does not have a food development/technical assistance facility.
- Requests for support from industry include:
 - Experts to work with companies to reformulate products.
 - Assistance with product reformulation and innovation—a BC food development centre.
 - Information on how to comply with labelling requirements.
 - Assistance with labelling costs—e.g. content analysis costs \$800.
 - Knowledge of who to talk to in government – for example at the Canada Food Inspection Agency and the BC Ministry of Health.
 - Technical information—food safety issues, info on cost of certification such as HACCP.
 - Long term contracts for reformulated products.
 - Technology transfer and exploration—e.g. more advanced machines elsewhere.
 - Better outreach to smaller processors about the HFBS guidelines and related resources.
 - One sheet listing where you can get products that meet the guidelines.
 - A list of top ten tips for marketing HFBs through vending machines. For example, size and shape of product packaging that work for vending machine coils.
 - More support for small scale producers given their triple bottom line benefits for farmers, community economic development and the environment (through reduced food miles for example).

8. Tasty food and more variety

For vendors and managers/purchasers of food services the narrow range of healthy food choices currently available is a significant issue. In order to meet customer expectations and preferences it helps to be able to offer them a wide variety of healthy choices—something for every taste.

Healthy Eating and Active Living

Industry would have more buy-in if there was consistency across health impacts of different products and policies. For example they question:

What is happening in BC restaurants in terms of healthy food and beverage choices?

The emphasis on healthy eating through these initiatives needs to carry a similar emphasis on physical activity with concurrent and complimentary messaging to the public.

Success happens!

One vending machine operator shared having success with implementing the HFBS guidelines by proactively creating win-win partnerships that link healthy food and beverage sales with physical activity.

OTHER POINTS:

- Most fresh foods require refrigeration—e.g. fresh fruit, yogurt, milk, soy beverages. This requires refrigerated infrastructure to supply products to the end user—warehousing, delivery vehicles and vending machines.
- Healthy foods can be more perishable. Spoilage costs are therefore higher, and there is need for more staff training on safe handling of these products. These and higher ingredient/processing costs mean healthy choices are sometimes more expensive choices—a challenge for market share.
- French fries in high school (and other cafeterias) can be much healthier if they are made in convection ovens rather than deep fat fryers. This would require a significant up-front investment by schools to buy convection ovens.

9. Level playing field

Vending machine operators' strongest request is for a "level playing field" (the same guidelines) for all food and beverage outlets in a facility.

Where the HFBS guidelines apply only to vending machines in institutions and facilities where concession stands or retailers offer junk food options, vending machine operators say they are at a significant disadvantage to comply with mandatory guidelines. Under these circumstances, vending machine operators have seen profitability decrease significantly. Anecdotally they have heard that revenues of retailers and concessions have increased.

OTHER POINTS:

- It has been proven that sales of healthier choices increase when traditional "junk food" selections are not also available.
- BC Government building guidelines should include all food service suppliers so as to encourage an increase in healthy food sales.
- Existing research demonstrates that Healthy choices items quickly gain in popularity when properly promoted and effectively positioned
- Vending machine hosts need to understand how to best implement healthy food and beverage sales in outlets to minimize and negative impact on sales.
- In light of the HFBS guidelines, it would be helpful to have communication from another source (than the vending machine companies) to schools and other institutions that commission structure needs to change to sustain profitability for vendors.
- "Do not target or market against vending machines. It's not machines; it's content."
- There are already plenty of vending machines offering healthy choices where circumstances make this economically viable.

Next Steps for the HFBS Initiatives

A proceedings document will be developed and distributed to meeting participants and will be made broadly available through the BCRPA website. The HFBS initiatives will be meeting to review the results of the meeting and the comments and suggestions offered by industry to determine next steps, where the HFBS initiatives can act, and who else should be brought to the table.

A follow-up meeting with industry and the HFBS initiatives is planned for February of 2009.

For more information, or to be included on the HFBS distribution list, please contact Anna Kirbyson, HFBS in Recreation Facilities and Local Government Buildings Coordinator at 604.629.0965 ext. 261 or akirbyson@bcrpa.bc.ca

Appendix A – Participant List

First Name	Last Name	Organization	Email
Brian	Kingman	Amazing Almonds	amazingalmonds@shaw.ca
Donna	Kingman	Amazing Almonds	n/a
Ann	Britton	BC Agriculture in the Classroom Foundation	Ann.R.Britton@gov.bc.co
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Estelle	Dufresne	Dietitians of Canada	estelle_dufresne@telus.net
Karen	Birkenhead	Dial A Dietitian	604-732-9191 or toll-free 1-800-667-3438
Carrie	Ferguson	Labour and Citizen's Servies	Carrie.Ferguson@gov.bc.ca

Appendix B – Summary of Participant Feedback

An on-line feedback form was made available to participants for a period of one week following the meeting. Sixteen participants completed an on-line evaluation survey.

WHO WAS THERE?

Representatives of vending companies, food distributors and processors, industry organizations, non-profit organizations and ministry representatives.

Usefulness

The day was rated “useful” to “very useful” by all participants

MOST USEFUL PART OF THE DAY

- Having a cross section of government, suppliers and vendors was a very good idea. Depending on the concern or input you had to bring to the meeting you could feel like at least a part of the correct “audience” was there to address your points.
- Round table and the big circle discussions. It was good to hear either the support, or the suggestions to address the lack of support by the cross section of the government and supply chain.
- Networking with new contacts.
- Interactive group discussions & clarification to vendors of sales guidelines.

LEAST USEFUL PART OF THE DAY

- Sitting around ‘brainstorming’. It seemed as though everyone had their own agenda and could not move past it towards a resolution.
- Fire drills
- Open forum at the end of the meeting. Also, the meeting was a little too long.
- It was all useful. I do not feel it would be fair to label any of it not useful.

Increased understanding:

As a result of the meeting, sixty percent of participants felt they had a better understanding of healthy food & beverage sales guidelines, twenty percent already had a firm understanding of the guidelines and 20 percent felt the question did not apply to them.

Relevance to business or job:

Participants overwhelmingly agreed that the content of the meeting was relevant to their company, business or job.

Improving future meetings

- Shorter time frame so that a larger number of manufacturers, vendors and distributors would attend. Need to have a broader representation so that healthy eating initiatives are supported in being able to access healthy food, beverage and snack choices in their communities.
- More industry representation - food processing, distributors, ingredient suppliers, technical representatives. I am concerned that the final report will indicate that as a result of this meeting and survey "industry" has been consulted when in fact there were only 15 companies and 1 industry association representative in attendance and of these only 5 represented the agri-food production sector. Keep in mind that there are over 1300 food processing companies in the province, many of which will be affected and/or could benefit through new opportunities afforded by the guidelines.
- More time for discussion.
- Limit the time to one morning, and distribute relevant info prior to the meeting.

Passing on the information

80 percent of participants intend to share what they learned at the meeting with others at work or in business.

Networking

Over 70 percent of participants made contacts useful to them or their business during the meeting.

Appendix C – Priority points as identified by participants

1. EARLY INVOLVEMENT OF INDUSTRY

- Guideline implementation timelines need to be longer to allow businesses to respond
- Early involvement of industry in designing policy

2. SYNERGY

- Better ongoing communication between existing and new programs
 - Helps promotion
 - Helps reduce duplication
 - Helps reduce confusion
- More synergy between all the [HFBS] initiatives
- Synergy in penetrating schools, institutions, hospitals, private homes in healthy eating habits, healthy choices.
- Synergy and linkages between Federal and Provincial initiatives, and linkages between provincial initiatives.

3. DISTRIBUTION/VOLUME AS A BARRIER TO IMPLEMENTATION

- Distribution and volume of product to justify economics of doing business
- Provincial vs. National mandate—difficult to create large scale change when BC is a small voice.
- Manufacturers looking at larger national picture—so difficult for distributors to find products that are guideline savvy.

4. PRODUCT AND COMPANY INFORMATION ON THE BRAND NAME LIST

- Brand Name list should have a link to the UPC and Vendor contact
- Umbrella of information—e.g. contact list of companies who are approved suppliers.
- Add purchasing list or contacts list to website alongside/to supplement the product list. ie. where can we buy the products identified in the BNFL?
- Link Brand ID and distribution—UPC, etc.

5. GENERAL PUBLIC AWARENESS

- To change the public view on the benefits of eating healthy
- Education of parents, students, teachers, managers, etc.

6. CONSISTENT LONG-TERM FUNDING

- Consistency and commitment from government, long term, matching business planning and development cycle.
- Need for long term government commitment to funding and support.

7. SUPPORT FOR PRODUCT DEVELOPMENT

- Industry needs guidance and support
- Who to call, labelling, etc—which agency
- Reformulation to meet guidelines
- Provide support for product development to meet national standards/guidelines
- Currently if the guidelines say under 200 mgs of sodium, then 200 mgs is too much. Guidelines should include wording such as “200 mgs of sodium or less”. This would allow more existing products to meet the guidelines.

8. TASTY FOOD AND VARIETY

- Product variety, tasty products
- We need tasty healthy food
- Most fresh foods require refrigeration—e.g. fresh fruit, yogurt, milk, soy beverage. There is no infrastructure to deliver products to end user—warehousing, delivery vehicles and refrigerated vending machines.

9. LEVEL PLAYING FIELD

- Equal opportunities vending and food service agreements (Contracts) for all suppliers
- Level playing field

Appendix D – Power Point Presentations