

Marketing, Consumers and Credence Attributes – Are Commodities Still Commodities?

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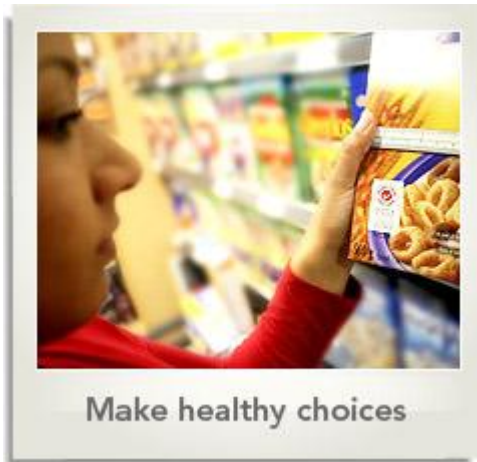
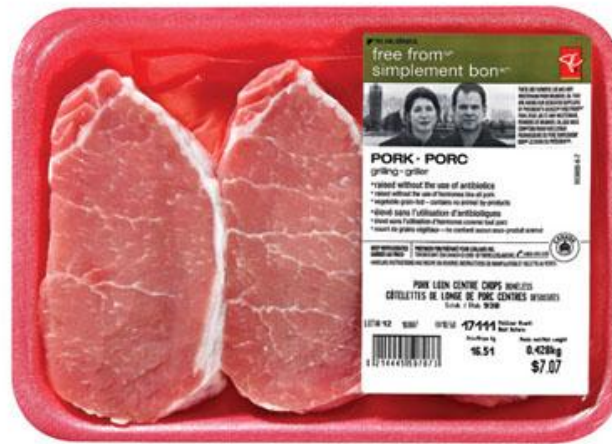
UNIVERSITY OF ALBERTA
DEPARTMENT OF RESOURCE ECONOMICS
AND ENVIRONMENTAL SOCIOLOGY

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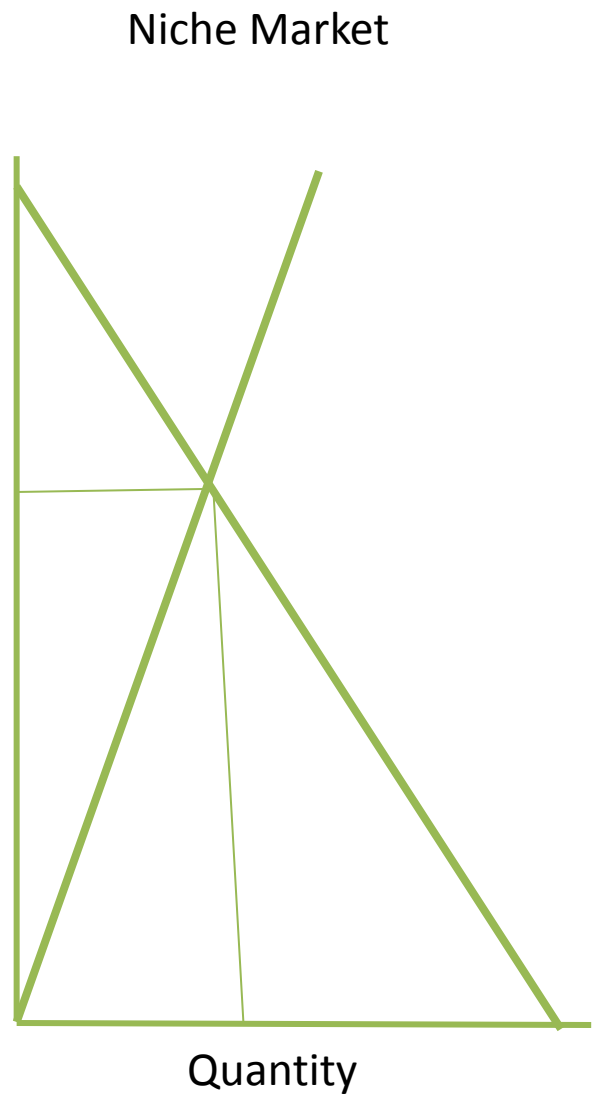
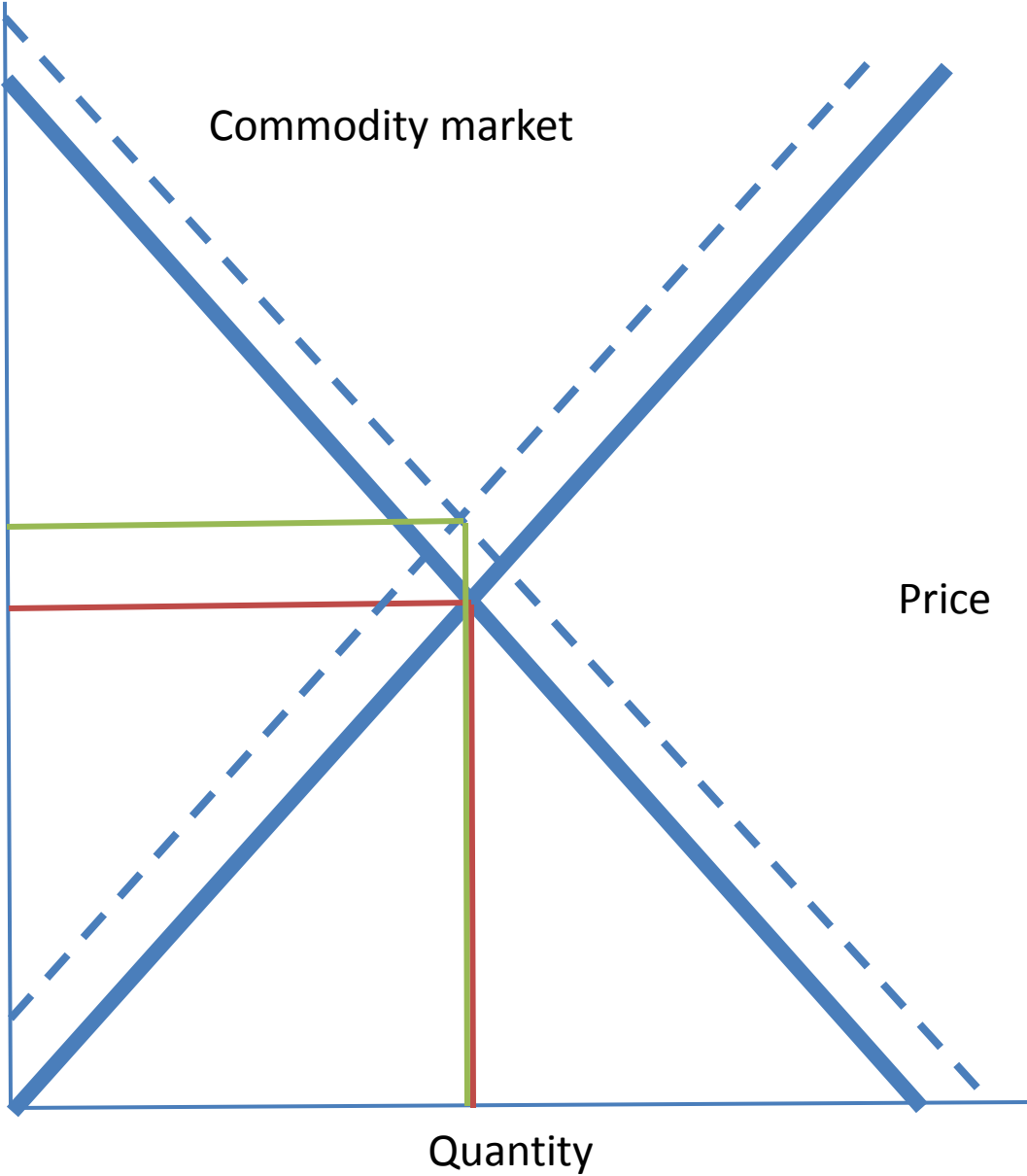
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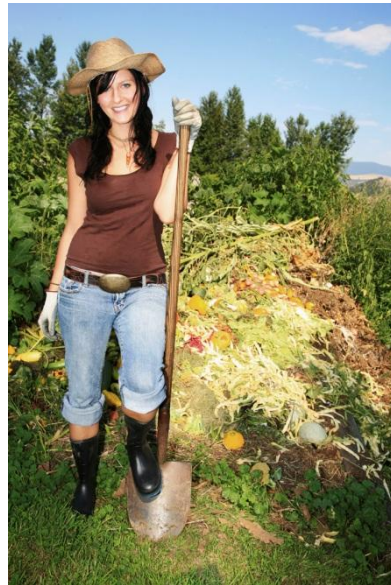
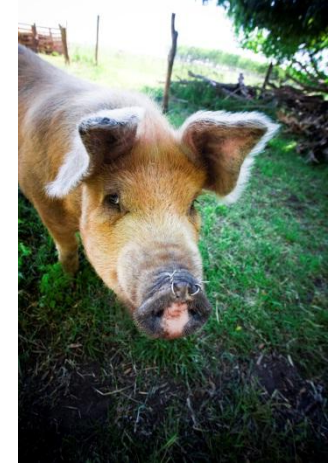
Beretta Ranch livestock is:

- *Raised without the use of antibiotics, hormones or steroids. (We give hugs, not drugs)
- *Vegetable/grain fed without the use of animal by-products. (We are what we eat)
- *Raised in Ontario. (We keep it real... real close. We support farms that are local to the Greater Toronto Area)
- *Canadian Angus Rancher endorsed. (Triple A Angus beef is how we roll)



How do niche markets work?





Ways of Establishing Willingness to Pay

Particularly for products that do not exist yet in the marketplace – combinations of attributes which don't exist

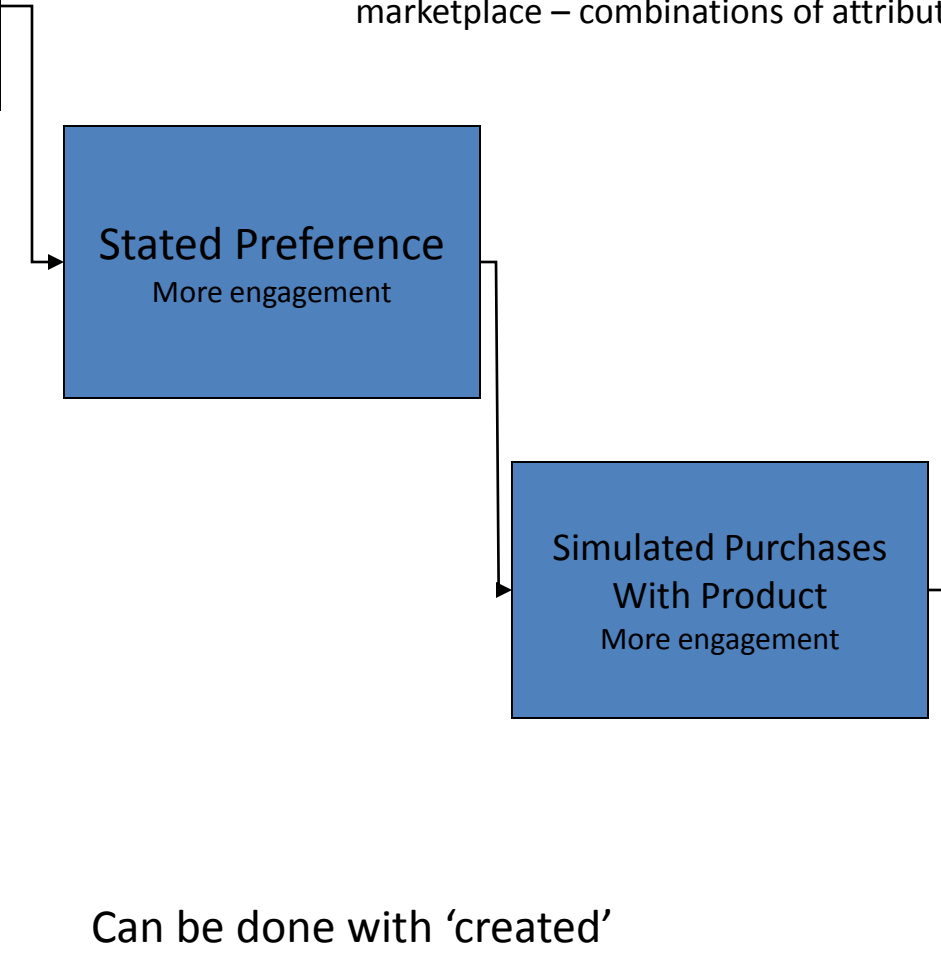
Ask WTP
Low predictive power

Stated Preference
More engagement

**Simulated Purchases
With Product**
More engagement

**Actual Purchases
(store environment)**
Most engagement

Can be done with 'created' product or with actual product (revealed preference)



Shell Eggs

Patrycja Romanowska, Getu Hailu, John Paul Emunu, Curtis Boyd, Andre Asselin, Amanda Neall and other capstone course undergraduate students

- Highly differentiated in the market – **conventional white**, *brown, large medium or small, free run, free range, Omega-3, vitamin enhanced, organic, vegetarian*
- Usually prices are regulated in the egg market for the conventional Grade A eggs
- Prices for the specialty eggs are negotiated between farmers and retailers and often require specific packaging

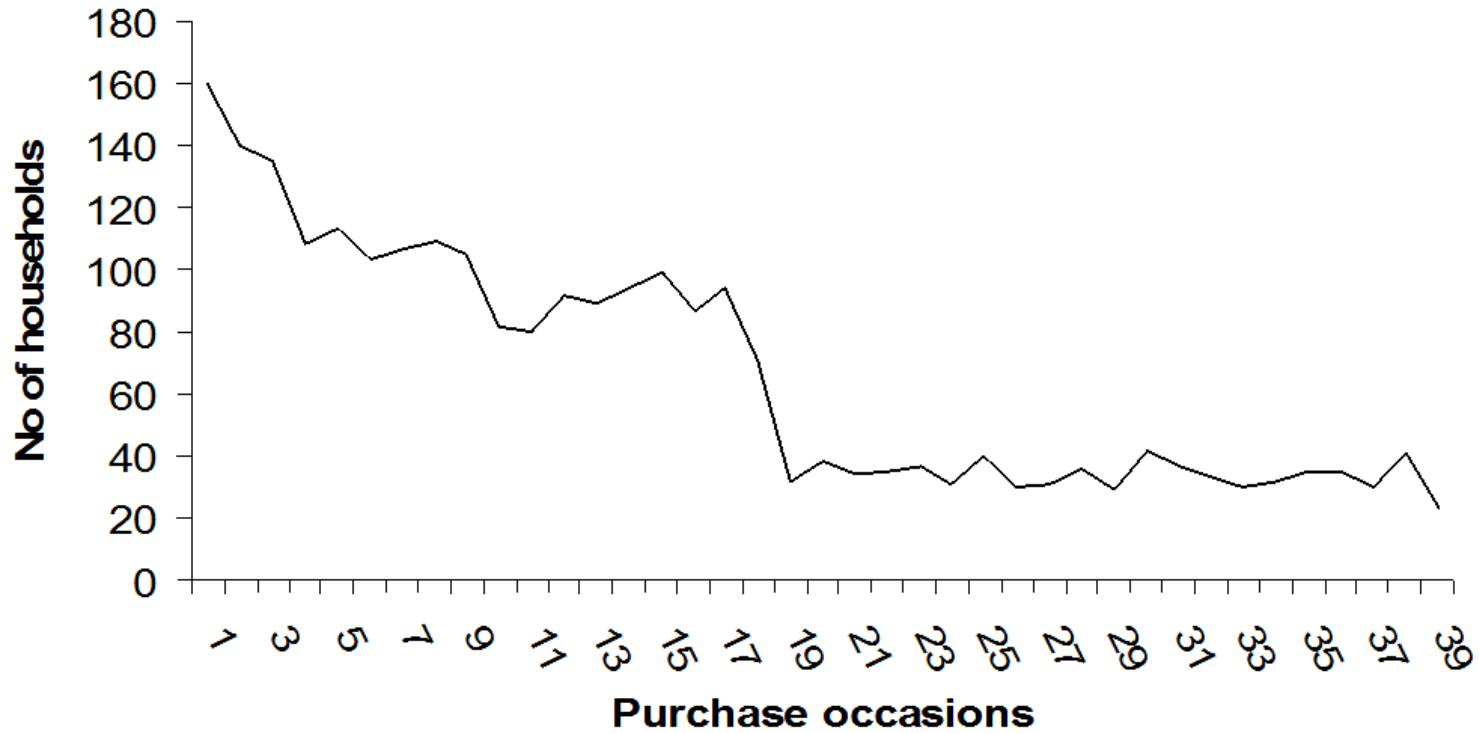
Results from a number of studies

- Used both revealed preference data (actual household purchases Nielsen Homescan™) and stated preference data with grocery store intercept, online survey and economic experiments

Revealed Preference Analysis

- Purchased an egg data set from The Nielsen Company
- Alberta sample – 2635 households, purchases over a 39 month period from February 2002 to January 2005

Summary of Purchase Occasions



Shell Egg Purchase combinations

Table 15. Shell Egg Purchase Combinations, Alberta Purchases

Egg Purchase	Original Data File	Sample Data
One Type		
Normal	1830	155
Omega	8	-
Free Range/Run	6	-
Organic	13	-
<i>Total</i>	<i>1857</i>	<i>155</i>
Two Types		
Normal\Free Range	48	2
Normal\Omega	59	7
Normal\Organic	480	94
Normal\Vitamin	15	3
Omega\Free Range	6	-
Omega\Organic	2	1
Omega\Vitamin	3	-
Free Range\Organic	2	-
Free Range\Vitamin	2	-
Organic\ Vitamin	1	-
<i>Total</i>	<i>618</i>	<i>107</i>
Three Types		
Normal\Free Range\Organic	18	4
Normal\Free Range\Vitamin	4	-
Normal\Omega\Free Range	10	-
Normal\Omega\Organic	35	9
Normal\Omega\Vitamin	18	6
Normal\Organic\Vitamin	10	1
Omega\Free Range\Organic	4	-
Omega\Free Range\Vitamin	1	-
Omega\Organic\Vitamin	1	-
Free\Organic\Vitamin	1	-
<i>Total</i>	<i>102</i>	<i>20</i>
Four Types		
Normal\Free Range\Organic\Vitamin	7	3
Normal\omega 3\Free range\organic	17	1
Normal\Omega \Free Range\Vitamin	5	-
Normal\Omega \Organic\Vitamin	15	2
Omega\Free Range\Organic\Vitamin	2	-
<i>Total</i>	<i>46</i>	<i>6</i>
Five Types		
Normal\Omega 3\Free Range\Organic\Vitamin	12	4
<i>Total Number Of Households</i>	<i>2635</i>	<i>292</i>

General Results

- Households with children more likely to purchase organic
- Older head of household more skeptical about specialty eggs
- Higher income more likely to purchase specialty eggs
- Generally not a high (revealed) willingness to pay for specialty eggs- *but we don't know anything about the attitudes of these household members*

Stated Preference

- Two surveys of Edmonton egg consumers
- First, face to face, questions about 'health' attribute eggs- normal, vitamin enhanced, omega- 3
- Second, internet, questions about 'production' attribute eggs- organic, vegetarian, free run/range
- Include in analysis the following attitudes –
 - Health consciousness
 - Health behaviour
 - Concerns about environment
 - Concerns about animal welfare

Empirical results : Intercept

- Health conscious more likely to purchase organic, free run, vegetarian eggs
- Households with children more likely to purchase organic
- Families with children and older heads of households are more price responsive than other households
- Higher willingness to pay for free run than for organic or vegetarian

Empirical results: Internet

- Health conscious consumers are willing to pay more for Omega-3 and Vitamin –enhanced eggs (*note that the premia in this study for ‘healthy eggs are lower than the premia for ‘production attribute’ eggs in the previous study)*)
- Older heads of households and families with children are more price responsive
- Households with children not willing to pay for Omega-3 or Vitamin-enhanced

Different Egg Study: 2009

- Question is whether or not certain attributes need to be certified – validated by external agents.
- Two studies in July and November 2008 conducted with actual economic experiments and stated preference choices
- Attributes selected include

Willingness to Pay for Certification Attributes: Two Studies

This table shows the premium consumers are willing to pay for certification of different attributes by different agents. WTP is *highest* for pasteurized and vitamin enhanced eggs that were government certified and industry certified for free run.

The free run attribute was most highly valued by consumers.

EGG TYPE	Pasteurised		Free Run		Vitamin Enhanced
	Summer 2008	November 2008	Summer 2008	November 2008	November 2008
AGENT	<i>WTP as compared to generic eggs with no certification</i>				
No certification		-\$0.55 (1.27)		\$0.26 (1.64)	\$0.28 (0.91)
Government Certification	\$0.85	\$1.22 (1.07)	\$1.16	\$1.42 (1.27)	\$1.38 (1.82)
Industry Certification	\$0.59	\$0.46 (1.66)	\$1.02	\$1.47 (1.95)	\$0.98 (1.35)
Farm Level Certification	\$0.42	\$0.60 (1.97)	\$1.21	\$0.69 (1.80)	\$0.76 (1.05)

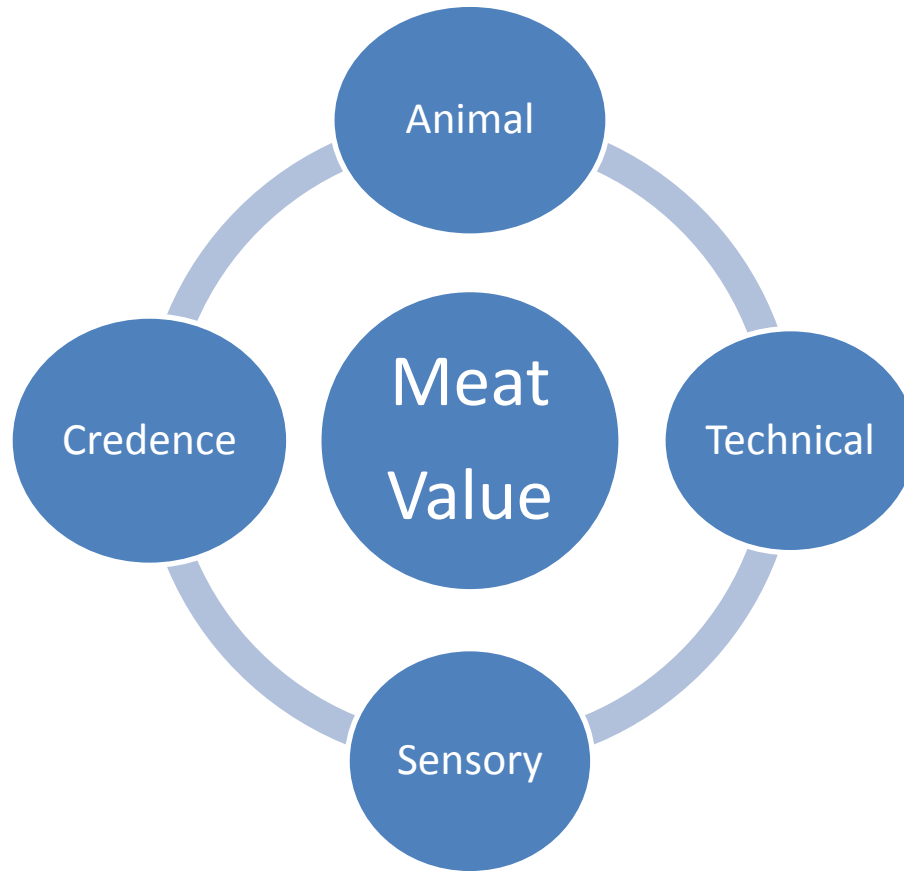
Traditionally Raised versus Conventional Pork

Steve Moore, Graham Plastow, Heather Bruce, Jennifer Janz, Mindy Gerlat,

Lifen Ma and Violet Muringai

- Study conducted in 2009 and 2011
- Slaughter 200 hogs from two different production systems 'traditionally raised' and conventional
 - collect DNA information, grading information,
 - do meat quality testing on loins,
 - do consumer sensory testing on loins (200 respondents),
 - do economic experiments on packaged pork chops to test WTP for different labelled attributes (same 200 respondents) – also complete survey
 - confirm experimental data with national survey (1600 Canadians)

Integrating Genomics, Meat Science, Consumer Science and Economics to Add Value
to Alberta's Hog Sector



Information Provided to Consumers When Examining Pork Chops

TRADITIONALLY RAISED
PRODUIT TRADITIONNELLEMENT

TRADITIONALLY RAISED - is defined as pork from a family farm production setting, reared outdoors or in bedded settings, with no subtherapeutic antibiotics or growth promotants, and no animal by-products in feed

CERTIFIED TRADITIONALLY RAISED
CERTIFIÉ PRODUIT TRADITIONNELLEMENT

TRADITIONALLY RAISED - is defined as pork from a family farm production setting, reared outdoors or in bedded settings, with no subtherapeutic antibiotics or growth promotants, and no animal by-products in feed
(Certified by the Canadian pork industry)

TRADITIONALLY RAISED
PRODUIT TRADITIONNELLEMENT



TRADITIONALLY RAISED - is defined as pork from a family farm production setting, reared outdoors or in bedded settings, with no subtherapeutic antibiotics or growth promotants, and no animal by-products in feed
(Certified by government)



CQA[®] promotes best management practices to reduce or eliminate potential on-farm hazards that could compromise the safety of pork.



Canadian Pork identifies fresh pork that is produced from hogs raised in Canada

5

A

5

B

PORK LOIN CENTER CHOPS BONE LESS

TRADITIONALLY RAISED
PRODUIT TRADITIONNELLEMENT ÉLEVÉ

Each chop 1 1/2" thick, grill 4-6 min per side. 1 1/2" thick, grill 6-8 minutes per side. Season chops with salt and pepper. Broil 10-12 min. Grill over medium coals or on a gas grill on medium high heat. Turn and broil to desired doneness. Temperature on meat thermometer should read 160 degrees F.

Safe Handling Instructions

THIS PRODUCT IS PROTECTED FROM BACTERIA AND ANTIBIOTIC RESISTANCE. PLEASE BUY HEALTHY SOME FOOD PRODUCTS TO SEE FOR MORE INFORMATION THAT COULD CAUSE ILLNESS IF THE PRODUCT IS MISHANDLED. PLEASE READ THE FOLLOWING INSTRUCTIONS CAREFULLY FOR YOUR PROTECTION. PLEASE FOLLOW THESE SAFE HANDLING INSTRUCTIONS:

- KEEP REFRIGERATED OR CHILLED. STORE IN REFRIGERATOR OR CHILLER.
- KEEP REFRIGERATED AND SEPARATE FROM OTHER FOODS. DO NOT REFRIGERATE TOGETHER WITH OTHER MEATS, BIRDS, SEAFOOD, OR DAIRY PRODUCTS. COVER AND STORE AT THE BOTTOM OF THE REFRIGERATOR.
- COOK THOROUGHLY.
- KEEP HOT FOODS HOT. REFRIGERATE LEFTOVERS IMMEDIATELY FOR STORAGE.

2 2 3 1 2 8 4 0 3 3 3 5

Tare	Store No.	Best Before	Total Price
0.015 kg	877	Nov 28, 09	\$3.57
Net Wt/ct		Unit Price	
0.405 kg		\$8.82/kg	

PORK LOIN CENTER CHOPS BONE LESS

Each chop 1 1/2" thick, grill 4-6 min per side. 1 1/2" thick, grill 6-8 minutes per side. Season chops with salt and pepper. Broil 10-12 min. Grill over medium coals or on a gas grill on medium high heat. Turn and broil to desired doneness. Temperature on meat thermometer should read 160 degrees F.

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- KEEP HOT FOODS HOT. REFRIGERATE LEFTOVERS IMMEDIATELY FOR STORAGE.

2 2 3 1 2 8 4 0 3 3 3 5

Tare	Store No.	Best Before	Total Price
0.015 kg	877	Nov 28, 09	\$5.36
Net Wt/ct		Unit Price	
0.405 kg		\$13.23/kg	

Traditionally Raised
Produit Traditionnellement

PORK LOIN CENTER CHOPS BONE LESS

Pork chops 1/2"-1" thick, grill 4-6 min per side; 1 1/4" thick, grill 6-8 minutes per side. Season chops with salt and pepper. Brush With oil. Grill over medium coals or on a gas grill on medium high heat. Turn and cook to desired doneness. Temperature on meat thermometer should read 160 degrees F.

Safe Handling Instructions

This product was prepared from inspected and passed meat and/ or poultry. Some food products may contain bacteria that could cause illness if the product is mishandled or cooked improperly. For your protection, follow these safe handling instructions.

-  Keep refrigerated or frozen. Thaw in refrigerator or microwave.
-  Keep raw meat and poultry separate from other foods. Wash working surfaces (including cutting boards), utensils, and hands after touching raw meat or poultry.
-  Cook thoroughly.
-  Keep hot foods hot. Refrigerate leftovers immediately or discard.



203 405 2345 01234 1928 0 01 23456

Tare 0.015kg	Store No. 877	Best Before Dec 23, 13	Total Price \$6.25
Net Wt/c 0.405 kg	Unit Price \$15.43/kg		



Marbling 2

Marbling 1

PORK LOIN CENTER CHOPS BONE LESS

Pork chops 1/2"-1" thick, grill 4-6 min per side; 1 1/4" thick, grill 6-8 minutes per side. Season chops with salt and pepper. Brush With oil. Grill over medium coals or on a gas grill on medium high heat. Turn and cook to desired doneness. Temperature on meat thermometer should read 160 degrees F.

Safe Handling Instructions

This product was prepared from inspected and passed meat and/ or poultry. Some food products may contain bacteria that could cause illness if the product is mishandled or cooked improperly. For your protection, follow these safe handling instructions.

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-  Cook thoroughly.
-  Keep hot foods hot. Refrigerate leftovers immediately or discard.

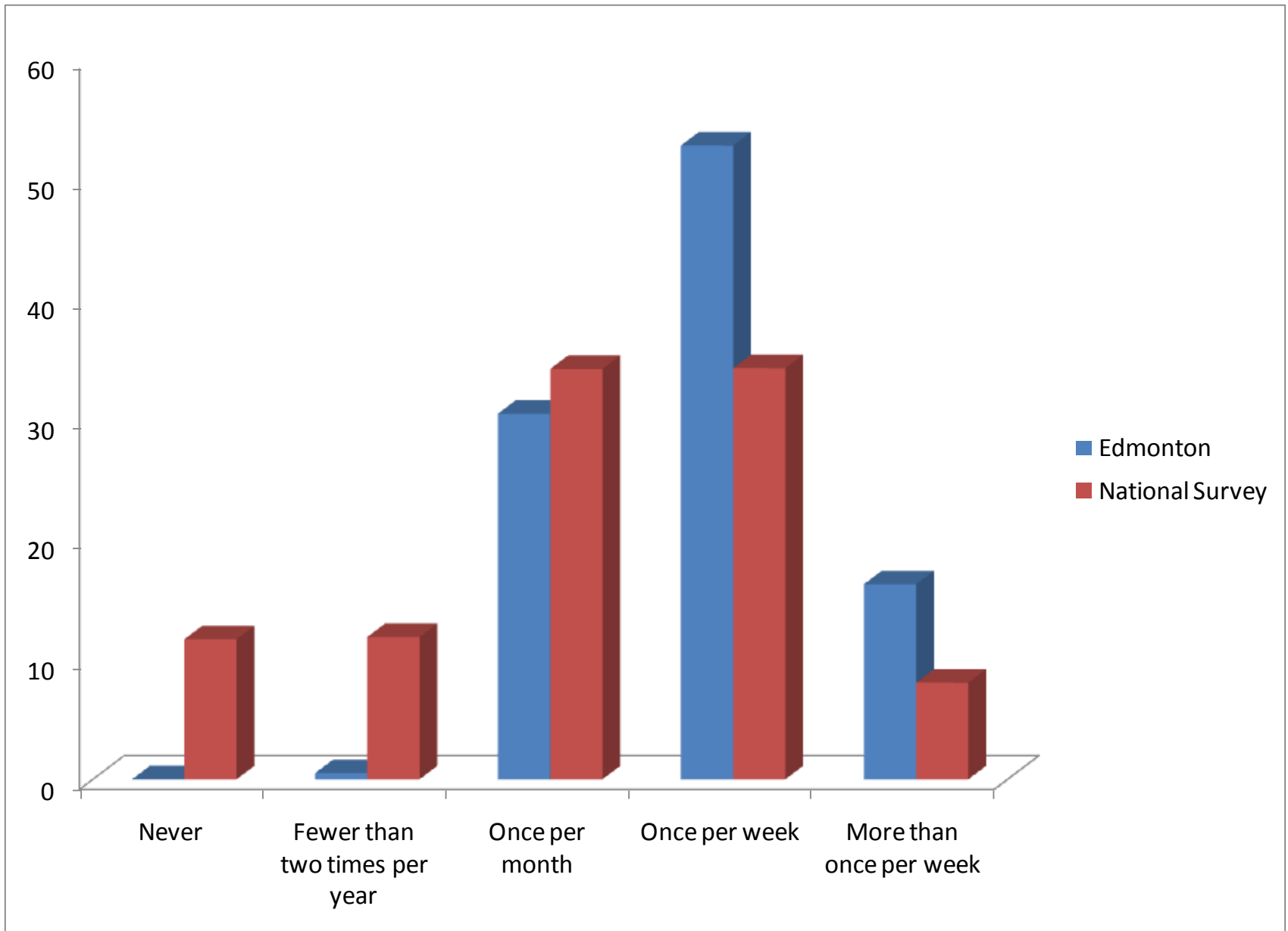


203 405 2345 01234 1928 0 01 23456

Tare 0.015kg	Store No. 877	Best Before Dec 23, 13	Total Price \$6.25
Net Wt/c 0.405 kg	Unit Price \$15.43/kg		

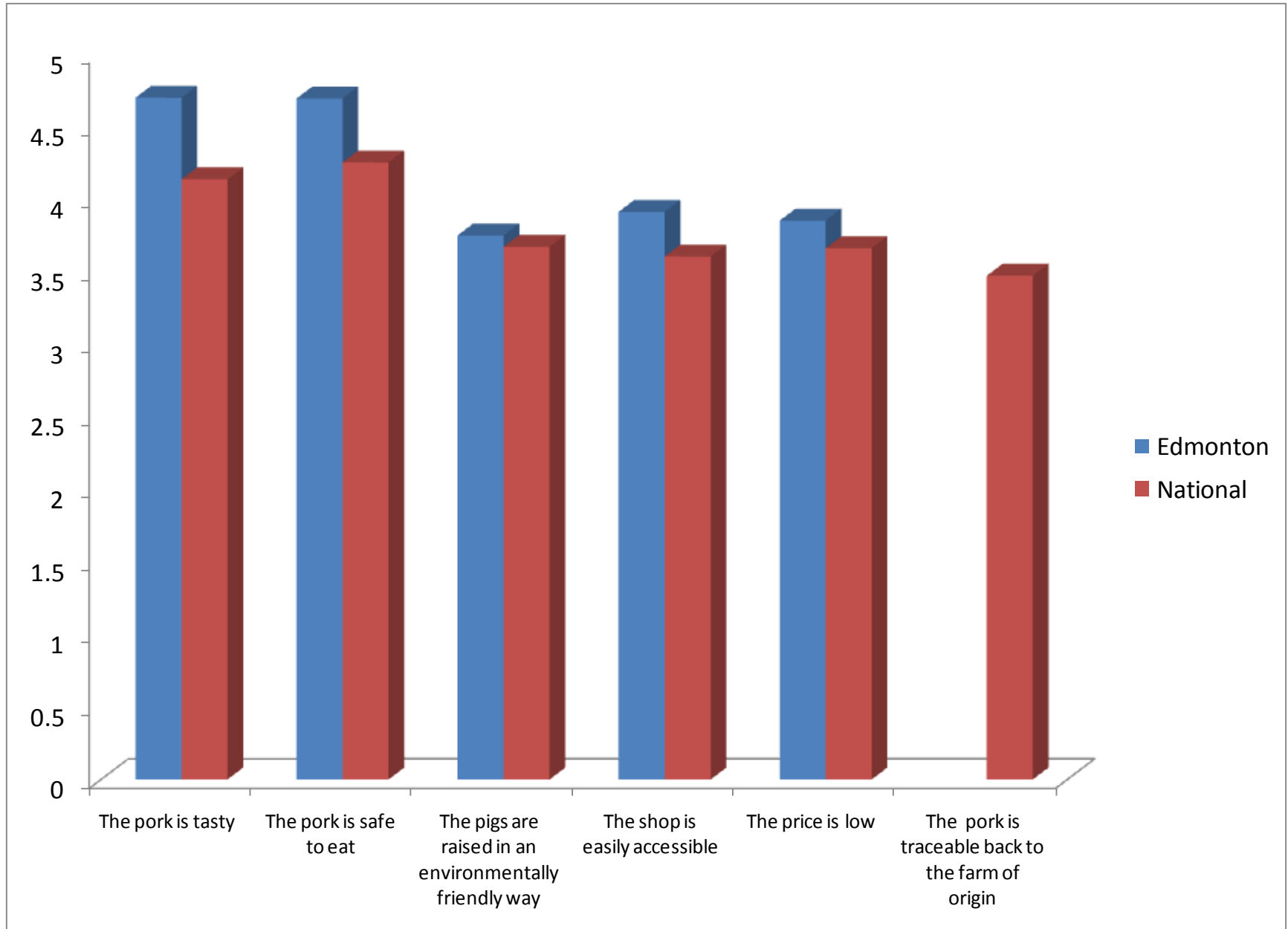


How often do you eat pork?



How important are the following when you purchase pork?

1= not very, 5 = very important)



**Calculated willingness to pay for pork chops with different attributes,
as compared to a conventional pork chop
(market average price \$8.82/kg)**

Attribute	\$ willing to pay	\$ willing to pay
	Edmonton	National Survey
Canadian Pork	\$1.95	\$4.93
Canadian Quality Assurance®	\$1.34	\$3.22
Certified Traditionally Raised	\$1.94	\$2.42
Government Certified Traditionally Raised	\$3.89	\$3.86
Conventional pork chop with Canadian Pork and Canadian Quality Assurance®	\$5.70	-\$2.31
Meat Quality Indicator Colour L*	- \$0.13	
Marble 1		\$0.73

Results

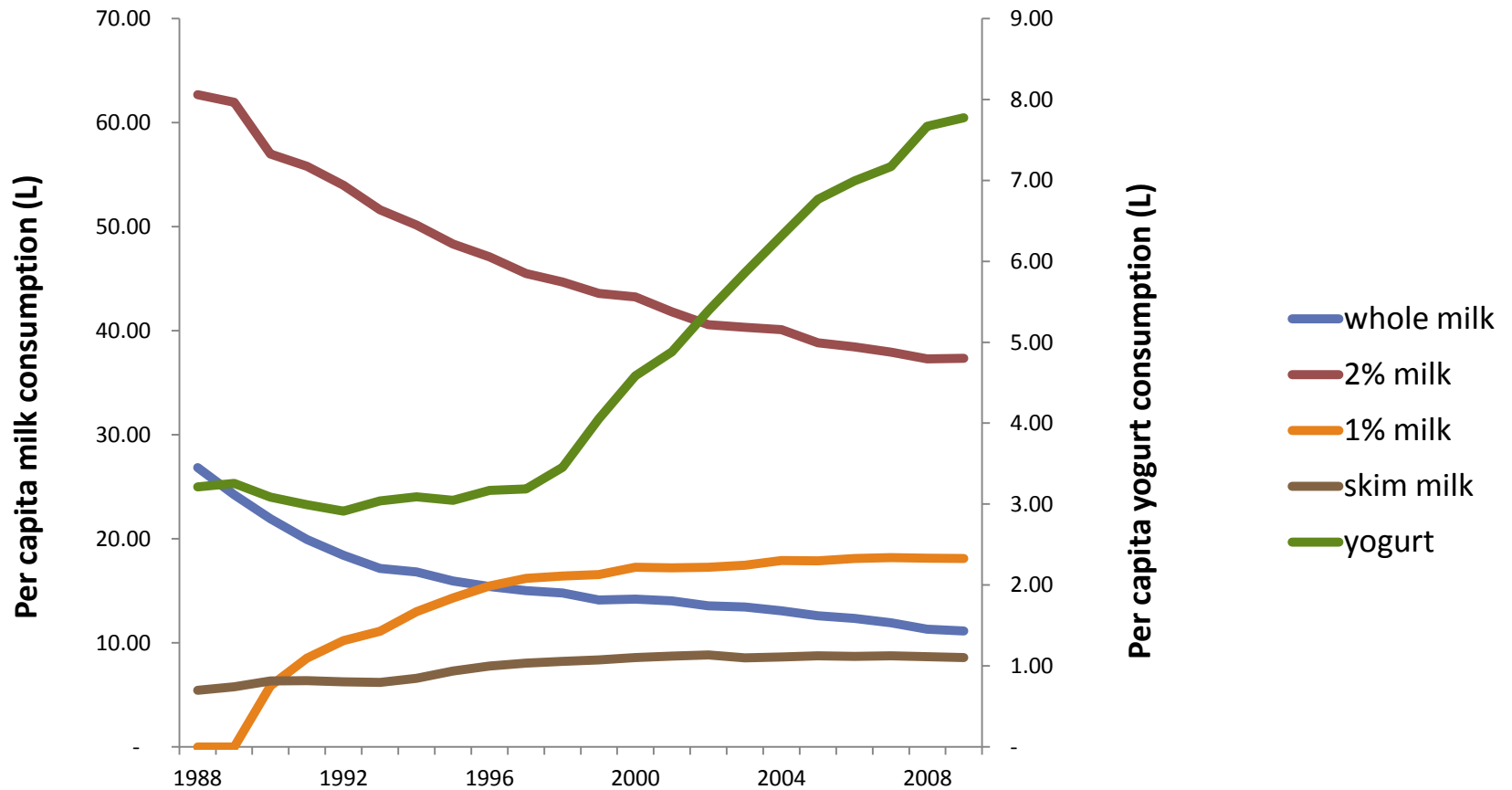
- More give in the system when you look at the national sample with a lower average pork frequency of consumption
- More to attract some non regular pork consumers

Milk versus Yogurt - what determines sales?

Shannon Allen and Anna Farmer

- Designed and implemented an online survey which identifies the drivers of current self reported consumption and the stated preferences for milk yogurt products which do not exist yet in the market.
- The national survey was fielded in early 2011 and 1700 Canadians completed the survey

Canadian per capita consumption of dairy products⁽³⁾



Choice Experiment - Experimental Design

Price (milk)	Price (yogurt)	Fat Content	Nutrition Label	Health Check™	Probiotic	Vitamin Enhanced
\$3.50	\$4.50	0% (skim)	Mandatory	No	No	No
\$4.00	\$5.50	1%	Voluntary	Yes	Yes	Yes
\$4.50	\$6.50	2%				
\$5.00	\$7.50	3.25% (whole)				

Prices are for a 2L carton of milk (average retail price: \$3.50) or an 8 x 100g package of yogurt (average retail price: \$5.50).

Experimental Design – Nutrition Label

- Nutrition Facts Panel:
(became mandatory in Canada in 2005)

Mandatory:

Nutrition Facts Valeur nutritive	
Per 1 cup (250 mL) serving/ par portion de 1 tasse (250 mL)	
Amount Teneur	% Daily Value % valeur quotidienne
Calories / Calories 90	
Fat / Lipides 0 g	0 %
Saturated / saturés 0 g + Trans / trans 0 g	0 %
Cholesterol / Cholestérol 0 mg	
Sodium/ Sodium 125 mg	5 %
Carbohydrate / Glucides 12 g	4 %
Fibre/ Fibres 0 g	0 %
Sugars/ Sucres 12 g	
Protein/ Protéines 8 g	
Vitamin A / Vitamine A	10 %
Vitamin C / Vitamine C	0 %
Calcium/ Calcium	30 %
Iron / Fer	0 %

Voluntary:

Nutrition Facts Valeur nutritive	
Per 1 cup (250 mL) serving/ par portion de 1 tasse (250 mL)	
Amount Teneur	% Daily Value % valeur quotidienne
Calories / Calories 160	
Fat / Lipides 8.0 g	13 %
Saturated / saturés 5.0 g + Trans / trans 0.2 g	26 %
Cholesterol / Cholestérol 30 mg	
Sodium/ Sodium 125 mg	5 %
Carbohydrate / Glucides 12 g	4 %
Fibre/ Fibres 0 g	0 %
Sugars/ Sucres 12 g	
Protein/ Protéines 8 g	
Vitamin A / Vitamine A	10 %
Vitamin C / Vitamine C	0 %
Calcium/ Calcium	30 %
Iron / Fer	0 %
Vitamin D / Vitamine D	45 %
Thiamine / Thiamine	8 %
Riboflavin / Riboflavine (B2)	35 %
Niacin / Niacine	10 %
Vitamin B12 / Vitamine B12	50 %
Pantothenate / Pantothénate	10 %
Phosphorus / Phosphore	25 %
Magnesium / Magnésium	15 %
Zinc / Zinc	10 %

Experimental Design - Health Check™

- The Health Check™ symbol was only shown if the product actually met the Health Check™ criteria.



Health Check™ criteria:

Milk (per 250mL)	Yogurt (per 175g)
2% milk fat or less	2% milk fat or less
Minimum 25% of daily calcium	Minimum 15% of daily calcium
240mg or less of sodium	140mg or less of sodium
No added sugar	No added sugar

Choice Experiment Example - Milk

PARTLY SKIMMED MILK

VITAMIN ENHANCED
Contains additional vitamin B₂, B₁₂ and D

1% M.F.

HEALTH CHECK
HEART & STROKE FOUNDATION

Vitamins A and D added

2 LITRES
Keep Refrigerated

Nutrition Facts Valeur nutritive	
Per 1 cup (250 mL) serving/ par portion de 1 tasse (250 mL)	
Amount Teneur	% Daily Value % valeur quotidienne
Calories / Calories 110	
Fat / Lipides 2.5 g	4%
Saturated / saturés 1.6 g	8%
+ Trans / trans 0.0 g	
Cholesterol / Cholestérol 10 mg	
Sodium / Sodium 125 mg	5%
Carbohydrate / Glucides 12 g	4%
Fiber / Fibre 0 g	0%
Sugars / Sucres 12 g	
Protein / Protéines 8 g	
Vitamin A / Vitamine A	10%
Vitamin B ₂ / Vitamine B ₂	0%
Vitamin B ₁₂ / Vitamine B ₁₂	30%
Iron / Fer	0%
Vitamin D / Vitamine D	70%

Ingredients: Skimmed milk, Vitamin A palmitate, Vitamin D₂, Vitamin B₂, Vitamin B₁₂.
Ingrédients: Lait écrémé, palmitate de vitamine A, vitamine D₂, vitamine B₂, vitamine B₁₂.

Price: \$3.50

A) I would choose this option



HOMOGENIZED MILK

PROBIOTIC

3.25% M.F.

Vitamin D added

2 LITRES
Keep Refrigerated

Nutrition Facts Valeur nutritive	
Per 1 cup (250 mL) serving/ par portion de 1 tasse (250 mL)	
Amount Teneur	% Daily Value % valeur quotidienne
Calories / Calories 190	
Fat / Lipides 8.0 g	13%
Saturated / saturés 5.0 g	28%
+ Trans / trans 0.2 g	
Cholesterol / Cholestérol 35 mg	
Sodium / Sodium 120 mg	6%
Carbohydrate / Glucides 12 g	4%
Fiber / Fibre 0 g	0%
Sugars / Sucres 12 g	
Protein / Protéines 8 g	
Vitamin A / Vitamine A	10%
Vitamin C / Vitamine C	0%
Calcium / Calcium	30%
Iron / Fer	0%
Vitamin D / Vitamine D	45%
Thiamine / Thiamine	8%
Riboflavin / Riboflavine (B ₂)	35%
Niacin / Niacine	10%
Vitamin B ₁₂ / Vitamine B ₁₂	50%
Panthenol / Panthothénate	10%
Phosphorus / Phosphore	25%
Magnesium / Magnésium	15%
Zinc / Zinc	10%

Ingredients: Milk, active bacterial cultures, vitamin D₂.
Ingrédients: Lait, cultures bactériennes actives, vitamine D₂.

Price: \$5.00

B) I would choose this option



C) I would choose neither of these options

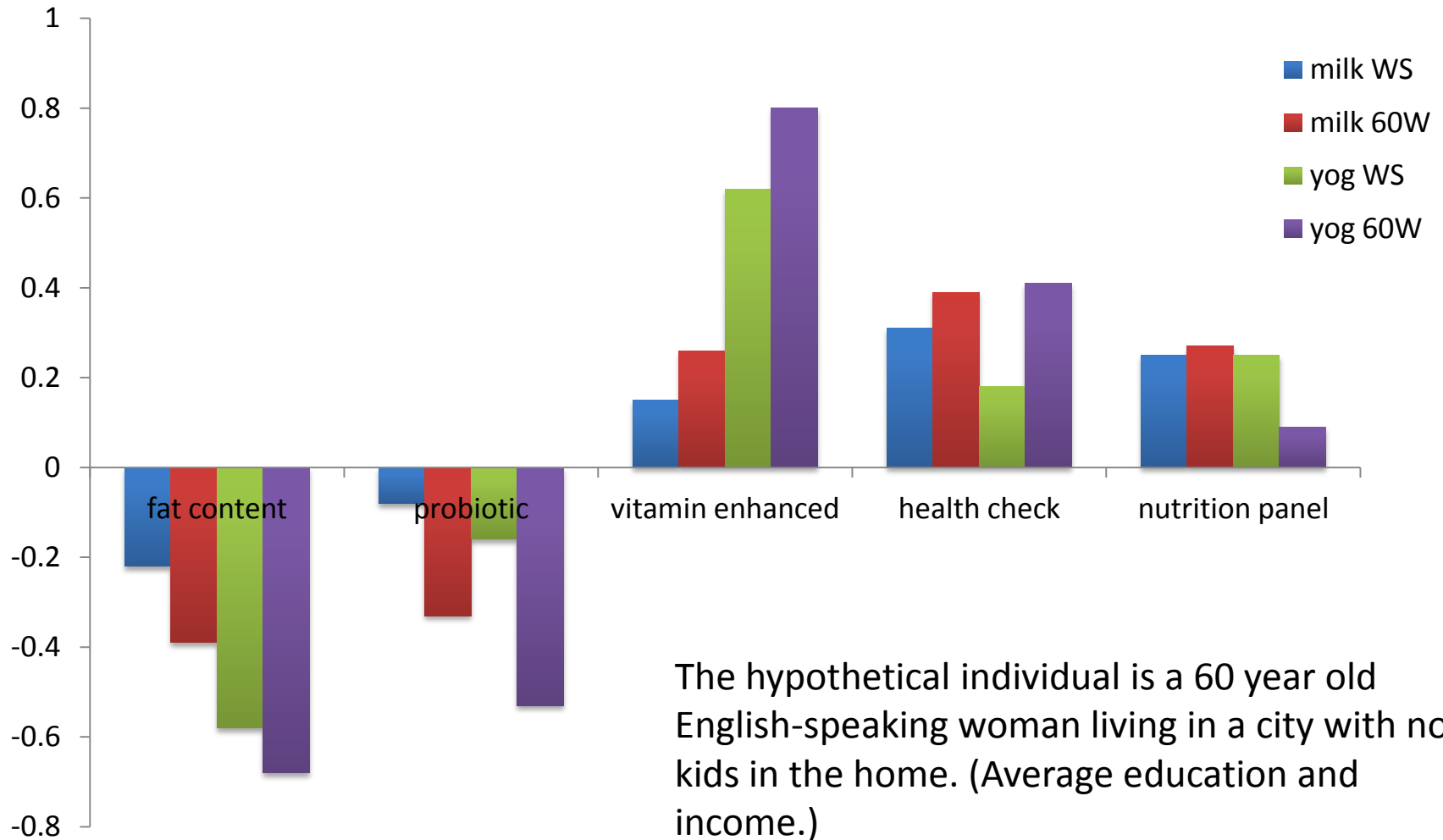


Mean Willingness to pay (WTP)

Attribute	Milk - WTP (in \$CAD)	Milk - SE	Yogurt - WTP (in \$CAD)	Yogurt - SE
Fat content	-0.22**	0.024	-0.58***	0.040
Probiotic	-0.08	0.064	-0.16**	0.079
Vitamin Enhanced	0.15***	0.051	0.62***	0.081
Health Check™	0.31***	0.052	0.18**	0.085
Nutrition Panel	0.25***	0.039	0.25***	0.065

Prices are for a 2L carton of milk (average retail price: \$3.50) or an 8 x 100g package of yogurt (average retail price: \$5.50).

General population vs. at-risk individual



The hypothetical individual is a 60 year old English-speaking woman living in a city with no kids in the home. (Average education and income.)

Trends in effects of health beliefs

Variable positively predicts avoiding fat in milk/yogurt	
Perceived pleasantness (self-reported behaviour)	✓
Perceived pleasantness (stated preference)	✗
Nutrition knowledge (self-reported behaviour)	✗
Nutrition knowledge (stated preference)	✓
Food plays a role in health	✓
Perceived severity of osteoporosis	✓

- People with higher perceived benefits of dairy consumption are more likely to consume milk/yogurt.
- Perceived pleasantness, susceptibility, severity, and health motivation are the constructs which affect acceptance of new attributes in both milk and yogurt. Self-efficacy and perceived barriers also play a role in the acceptance of new attributes in yogurt.

Overall Results

- In all three cases it is easy to identify demographic segments of the population that would rather purchase 'niche' items than commodity items
- For many of these 'niche' characteristics it is necessary to have third parties verify/certify the attributes to maximize uptake by consumers and value for producers
- As well as demographics – frequency of current purchase can influence desire for 'niche' attributes – it appears that those who are high frequency consumers care less about the addition of 'niche' attributes
- The motivation for 'niche' attributes is less than clear in some cases – it appears that a desire for health is driving the demand for free run eggs more than for Omega-3 eggs or vitamin enhanced eggs – is this because of misperception about how Omega-3 or vitamins are added to these livestock products
- Revealed preference data suggests significant premia for niche markets – the existence of niche markets should be good for producers of conventional product as well as niche marketers -rather than ignoring the niche markets in general perhaps they should be encouraged through facilitating certification.
- More work is necessary on motivation to properly determine the types of products that will flourish in different sectors

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- Agriculture and Agri-Food Canada
- Consumer and Market Demand Network
- Faculty of Agriculture, Life and Environmental Sciences Food and Health Research Innovation Initiative
- The Canadian Dairy Commission
- Alberta Advanced Education and Technology

- [http://www.heartandstroke.com/site/c.iKlQLcMWJtE/b.3483961/k.FBE9/Health Check8482 Designed to help you make healthy food choices.htm](http://www.heartandstroke.com/site/c.iKlQLcMWJtE/b.3483961/k.FBE9/Health%20Check8482%20Designed%20to%20help%20you%20make%20healthy%20food%20choices.htm)
- <http://www.sharemastro.com/natura/>
- <http://wakeup-world.com/2011/09/15/10-great-reasons-to-eat-local-food-where-you-can-pick-your-own/>
- <http://www.loblaws.ca/LCLOnline/products.jsp?productId=20024&type=details>
- http://www.burnbraefarms.com/consumer/our_products/omega_pro_liquid.htm
- <http://www.nationalegg.ca/freerun.php>
- <http://dawhois.com/site/berettaranch.ca.html>
- <http://www.21food.com/showroom/81615/aboutus/novo-marketing-inc..html>