



# Tracking the Wild Mushroom: Canada's Wild Mushroom Commodity Chain

*This extension note describes the path wild mushrooms take as they move from Canadian forests to consumers in local, national and international markets. It does this by describing the sorts of people and firms that are the links in the chain connecting these places: the Canadian wild mushroom commodity chain.*

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## Overview

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The key players in Canada's wild mushroom commodity chain are pickers, field buyers, distributors, processors, retailers and consumers. Here's what each of them does:

**Pickers.** Pick mushrooms in forests and other natural areas, and deliver them to field buyers' stations.

**Field Buyers.** Weigh and grade the mushrooms, and pay the picker cash accordingly. Account for the day's purchasing, and ship it to a distributor via the nearest airport.

**Distributors.** Supply the cash needed to buy large volumes of mushrooms. Operate sorting, processing, packaging and storage facilities, often near major airports. Sell large quantities in specific forms to meet local, national and international demand.

**Processors.** Clean, grade, dry, sort, package, slice, cook, combine or otherwise transform raw mushrooms into value-added forms.

**Retailers.** Promote mushrooms in particular markets, selling them to consumers at farmers' markets, craft shows, gift shops, specialty grocers and restaurants.

**Consumers.** Cook mushrooms and/or give them to others, the final stages of wild mushroom processing and distribution. Finally, eat them.

Some of these roles are often combined in the same person or firm.

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## A Day of Mushroom Harvesting and Buying

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Commercial mushroom pickers come in all sorts: men, women and sometimes children; locals who



pick when the season hits the area they live in; and itinerants who follow the mushrooms north and south, or east and west, across the country or continent. Most are men in their late 30s and up. They travel around their own provinces with campervans and pickup trucks, staying in temporary camps off of forest service roads, close to areas rumoured to be “flushing” (with new mushrooms). Most have been picking for decades, and are part of broad social networks that include locals, field buyers and distributors. These networks spread the word about where the mushrooms are now, or might be found next. In the main, they focus on four main types of mushrooms: pines (matsutake), chanterelles, morels and boletes.

Often having picked in the same areas for years, even decades, pickers know and remember the exact trees and gullies where mushrooms grow, and go out on a daily basis to check, and hopefully harvest, their patches. They start early, sometimes before sunrise, to get there before their competitors do. The most easily accessible and prolific patches are both highly desirable and widely known.

Pickers combine this personal and social knowledge with an expert understanding of the mushroom and its environment. They have highly developed, practiced abilities to understand, interpret and remember the forest and its places through sight and touch. Pine mushrooms, for instance, grow deep beneath the ground, and are usually harvested by keen-eyed pickers when their caps just begin to disturb the surface—at the absolute latest. Following their preferred route through the forest from patch to patch, pickers constantly scan the ground for any deformations: a crack showing just the right shape and shade of white to be a pine mushroom cap (Image 1), or the slightly less dense appearance of moss pushed up by a subterranean mushroom. They also notice “pick marks,” disturbances left by other pickers. Spotting signs like these, they use their fingers to pierce the earth, feeling for changes in texture and density indicating one or more mushrooms deep beneath, missed by the last picker. At

undisturbed or less precisely located patches, they might feel the earth with a flat hand, sensing far under the ground. The most masterful pickers can feel the tell-tale bump of a possible mushroom through the soles of their shoes as they walk gently through the forest, and will stop short to probe around further, often producing a mushroom or three for the effort. These new locations are added to the mental map.



Image 1: Spotting a ground cover disturbance from a distance

Picking ceases by mid-afternoon, when the pickers head toward town to sell their harvest to a field buyer. Field buyers operate buying stations in a nearby urban area or on a major roadway; there are also sometimes stations in the larger camps of itinerant pickers. Stations can be a commercial space rented for the duration of the season, or simply a table and scale beside a van that serves as office and warehouse. At their buying station, field buyers clean, grade and weigh the mushrooms brought in by pickers, paying them the day’s price per pound for each grade and giving them a receipt. They then warehouse and account for the day’s volume as a whole, and at the end of the day package and ship the mushrooms in bulk to the

distributor they work for.

Like picking, buying and selling mushrooms is a thoroughly social affair. Everyone wants to find a buyer paying the day's best prices, and prices fluctuate wildly based on competition and the movements of the global market. Pickers make brief stops en route to the buyers, spreading the word on who is paying what price, and, because the price is based on the grade assigned, how tough they are being with the grading standards (Figure 1). Because many field buyers are former pickers, they have long-standing relationships with "their" pickers, and will offer better prices, grading or other bonuses like food and drink to entice the most successful. Therefore, most pickers have a preferred handful of field buyers that they sell their harvest to, and sometimes even remain loyal to the field buyers of one distributor. Managing and mobilizing social ties, information, and the mechanics of pricing and grading is the key task of field buyers. They are paid based on the volume they can command, and use these skills to out-buy their competitors, as well as motivate the pickers to keep harvesting.



Figure 1: A Matsutake grading guide

Together, pickers and field buyers form the production end of the Canadian wild mushroom commodity chain. Pickers use their social and ecological expertise to find out where mushrooms are growing, get there quickly and flexibly, and extract them from the forest in large

quantities. Field buyers negotiate pricing, grading and transportation to turn mushrooms into a commodity, enticing the pickers to bring in the harvest, and the distributors to pay out the cash to buy it.

## Getting the Mushrooms to Markets

Some field buyers are also their own distributors: they buy a relatively small quantity of mushrooms with their own money throughout the season, and then sell them fresh or dried to other distributors, or to retailers and consumers directly. A major portion of commercial activity, however, is driven and funded by dedicated distribution firms that maintain a network of field buyers, who buy on their behalf at many points across a region at the same time.

The major role of distributors is to understand and meet the needs of various types of customers in far-flung places. Distributors are tapped into local, national and, in some cases, international markets. Throughout the season, they are in constant communication with their customers about prices in national and global market centres, as well as specific upcoming orders and needs. They are aware of and can meet requirements for different sorts of packaging and grading; for transportation and logistics; for export, import and customs documentation; and, for payment and contracting across currencies, time zones and legal systems. They also have the social connections and cultural knowledge required to meet and keep customers in a wide variety of places, each requiring different ways of acting in business and social contexts.

Different sorts of customers also desire different grades and conditions of mushrooms at varying price points. By collecting large quantities of mushrooms, distributors can pick those best suited to each need, maximizing satisfaction and profit, and minimizing waste. For instance, distributors can export top grade fresh mushrooms to international markets paying the



highest prices, direct mid-grades to local markets with less finicky standards, and sell mushroom pieces to processors. Because fresh mushrooms are perishable and come in unpredicted quantities and qualities in any given area, smaller distributors or individual pickers are kept out of many of these markets. By using networks of field buyers to amalgamate mushrooms from a dispersed area, distributors are able to guarantee large volumes of specific qualities and prices of product over a period of time. Such guarantees are demanded by customers like grocery chains and even some restaurants.

Because accessing these opportunities requires the ability to consistently command large volumes of raw product, and this in turn requires the maintenance of a network of field buyers, distribution is capital intensive. In peak season, a single field buying operation can easily buy \$15,000 worth of mushrooms per day, and the larger distributors could have multiple field buyers buying at that rate at any one time.

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## Adding Value

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Processing is another key function of distributors. In many cases, they are the final processor before the product reaches consumers, contracted for a specific species and even size of mushroom, properly cleaned, graded and packaged. But processing also takes place elsewhere in the commodity chain. Some distributors have offered a premium to pickers for clean mushrooms, passing on the savings from not having to do it in their facilities (and not having to ship dirt). Pickers and field buyers also often dry mushrooms in the field, preserving them to sell after season's end, when stocks are low and prices are higher. On the other side, distributors can sell to processors who combine the mushrooms with other foods to create sauces, pickles or ready-to-eat meals that have both longer shelf-lives and higher prices.

In all cases, processors add value to the final

product by doing something that enhances its quality. This also includes steps taken to increase the desirability of the product to consumers. For instance, many distributors have their own brands in the marketplace, and package their product in a variety of sizes for consumer markets, even if the product goes through the hands of another distributor or retailer first. Having a known, quality brand associated with the Canadian wilderness, in a pleasing and informative package, can be a sound strategy for enhancing value. So can transforming the product in other ways, for instance by smoking or aging it to add flavour or increase its uniqueness and prestige (Image 2).



Image 2: a branded package of alder-smoked, wine-cask aged wild chanterelle mushrooms

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## Building and Satisfying a Market

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So far we've seen mushrooms picked, purchased, processed and distributed; the last step before the consumer is retailing them. As with processing, retailing is a function that is often blended with other functions. Some pickers, for instance, clean, grade, dry, package and then sell mushrooms direct to consumers at farmers'



markets. Some distributors operate retail outlets or websites. In fact, much of the Canadian wild mushroom commodity chain started this way, and grew into more differentiated forms. Many of today's retailers and distributors are yesterday's field buyers and pickers.

Retailers are responsible for educating customers, chefs and the media about the existence and value of wild mushroom products. They get the word out in ways that compel people to want these products. For instance, they give customers tempting recipes that demonstrate how to best use these often unfamiliar mushrooms, at the same time dispelling fears about whether they are safe or good to eat. They provide a friendly face to trust, one that seems to offer a personal connection to the people and places the mushrooms came from.



(Image 3).

Image 3: Selling wild mushrooms at the farmer's market

It's no surprise, then, that in Canada the major retail sites for wild mushroom products are restaurants, farmers' markets, craft shows and gourmet food shops: places that offer a more involved and personal sales process. As knowledge about and interest in these products increases among the public, Canadian retailers are also developing sales at more mainstream venues, like gift shops in areas with high tourist traffic, grocers like Whole Foods and Costco, and on the Internet.

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## Eating Mushrooms: The End of the Line

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Of course, Canadian wild mushrooms aren't just retailed in Canada: they're enjoyed by consumers across North America, Europe and Asia, and sold in a wide variety of places specific to the countries and cultures that are their final destination. Although Canada's wild mushrooms are a small part of the global trade, their association with the untamed wilderness of the Canadian north makes them a unique and valuable part of the market. Whether cooked in a restaurant or at home, or given as a gift, this taste of the wild involves the combined efforts of a wide variety of Canadians, each adding their own expertise and value to the wild mushroom commodity chain.



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## Useful Links

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- **Association pour la commercialisation des champignons forestiers.**

<http://www.acchf.ca/>

The Association for the Commercialisation of Forest Mushrooms offers training and certification for forest mushroom harvesters.

- **Matsiman.com**

<http://www.matsiman.com/>

Matsiman.com is a website dedicated to the harvest of pine or matsutake mushrooms in North America. It features news, articles and a lively forum for pickers, buyers and sellers of these and other species.

- **Morel Mushroom Hunting Club**

<http://www.morelmushroomhunting.com/>

This site offers news and links related to morel mushrooms in North America. It includes a frequently updated sightings map allowing one to trace the progression of the season, and a forum for the discussion of morel and other culinary mushrooms.

- **David Arora's Homepage**

<http://www.davidarora.com/>

A prolific researcher of and writer on wild mushrooms in North America, Arora's site includes a number of his key publications about picking, buying and selling

- **Untamed Feast Homepage**

<http://www.untamedfeast.com/>

A British Columbia company offering wild mushroom products.

- **Forbes Wild Foods Homepage**

<http://www.wildfoods.ca/>

An Ontario company offering a wide variety of wild food and mushroom products.

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