AGRICULTURE AND AGRI-FOOD SECTOR STRATEGY

SEPTEMBER 2017

York Region

Acknowledgements

The project team would like to extend its sincere gratitude to the York Region Agricultural Advisory Liaison Group (YRAALG) and York Regional staff, who volunteered time and effort to the development of this strategy.

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Executive Summary

As one of Canada's fastest growing communities, York Region is anticipated to grow from 1.1 million to 1.5 million by the year 2031. This forecasted growth has created unique opportunities and challenges for York Region's agriculture and agri-food sector. While a growing population means more pressure on the existing land base in York Region, it also provides access to a large and diverse customer base for primary producers and processors. The purpose of this agriculture and agri-food sector strategy is to understand the sector's current strengths, opportunities and challenges while also developing an action plan for the future. The York Region Agriculture and Agri-Food Sector Strategy demonstrates York Region's commitment to supporting the long-term economic prosperity and viability of the agri-food sector.

This strategy was informed by two research phases including a public stakeholder effort and an economic impact analysis of York Region's agri-food sector. These efforts are timely as the updated Census of Agriculture was released in May, 2017. This executive summary provides an overview of the strategy, while the full report presents a complete account of the work undertaken. Section 7 outlines each strategic goal area in full detail, including timelines, lead responsibilities and performance metrics.

This strategy is a living and breathing document that should be implemented and updated as the Agri-food sector evolves in York Region

York Region's Agriculture and Agri-food Sector Strategy includes 5 strategic goal areas, accompanied by 45 recommended actions. Eighteen of these action items are on-going in scope while six are short-term (within one year), nineteen are medium (two-four years) and two are long-term (greater than four years).

Figure 1: Structure of the York Region Agriculture and Agri-Food Sector Strategy

York Region has demonstrated a commitment to a vibrant and sustainable agri-food sector through the *York Region Official Plan, 2010; Vision 2051;* and the *Region's Economic Development Action Plan*. These existing documents shaped the overall vision for this strategy. This strategy will add value to these policies and strategies by providing York Regional staff and Council with a roadmap to ensure agriculture remains a strong and viable sector in the future. It is crucial to have a comprehensive and informed strategy in place that will help the Region accommodate future opportunities and challenges.

Vision 2051

- Agricultural areas are thriving and provide healthy food & resources to a growing population.

Official Plan 2010

- Agricultural & Rural Areas form an important part of the fabric of York Region, supporting a vibrant agricultural community & contributing to the economy, quality of life & natural heritage legacy. The diverse landscape is one of the things that makes the Region attractive to citizens & business.

Figure 2: Guiding principles for overall vision for the Agriculture and Agri-Food Sector Strategy from the Regional Municipality of York (Vision 2051 and the Official Plan)

- Recognizing the role of agriculture on the landscape & in our heritage and economy
- Ensuring high-quality agricultural land is available for growing and producing local food that is accessible to residents & communities
- Facilitating a secure & safe food supply by encouraging local food production, farmers markets, field-to-table initiatives & a 100–mile diet
- Recognizing the value of the agricultural landscape for its economic productivity, contribution to sustaining natural habitat & corridors, & as a carbon sink
- Encouraging value-added food production, food manufacturing and processing

Figure 3: Core Principles from Vision 2051 (A Resilient Natural Environment and Agricultural System)

The quadrant below is a summary of the SCOT (Strengths, Challenges, Opportunities and Threats) exercise based on online survey, key informant interviews and open house findings.

Strengths	**Challenges**
• Proximity to markets and diverse customer base • York Region is a “great place to do business” • Abundance of prime agricultural land • One of two provincial Specialty crop areas (Holland Marsh) • Strong agricultural heritage • Diverse range of production across the Region (livestock, field crops, vegetable production) • Strong broadband connectivity in some parts of the Region	• Urbanization and growth across the Region • Challenging regulatory environment • Lack of profile for agriculture in the Region • Broadband connectivity issues in some parts of the Region • History of poor consultation and communication with the agricultural sector
Opportunities	**Threats**
• Growing demand for local food and specialty products • Agri-tourism • Educational opportunities • Technology and innovation (vertical farming, improved farming practices) • Demand for healthy food (Interest in local food procurement) • Rouge National Urban Park • Unique Partnerships	• Forecasted growth and urbanization • Difficult for new entrants into the sector • High rental land rates may result in less sustainable farming practices (not invested in long-term production) • Tightening of provincial regulations may limit on farm value-added opportunities

Figure 4: York Region Agri-Food sector SCOT Analysis (based on stakeholder consultation findings)

Census of Agriculture and Economic Impact Analysis Findings

Key findings from the updated Census of Agriculture and economic impact analysis include:

- The number of farms in York Region has dropped since 2001 and has decreased by 116 since 2011, yet size of farms are increasing
- Gross farm receipts per farm, which is a measure of farm business income, is rising in the Region
- York Region’s farm cash receipts per acre is $1000 higher than provincial farm cash receipts per acre due to high value crop production (such as vegetables)
    - East Gwillimbury in particular has notably high farm cash receipts value per acre
- The average age of producers in York Region has increased from 56.9 in 2011 to 58 in 2016, which is reflective of overall trends across Canada

- Data on direct farm marketing was included for the first time in the 2016 Census; 20 per cent of farms in York Region reported direct-to-consumer sales using farm gate sales/kiosks/pick-your-own
- In York Region, 52.7 per cent of the land is either rented, leased or crop shared (compared to 32.4 per cent in Ontario)
- The economic impact of primary production agriculture in York Region extends well beyond the $302 million of direct farm cash receipts in 2016.
- When the indirect and induced economic activity are included the total economic impact is over $552 million[1]

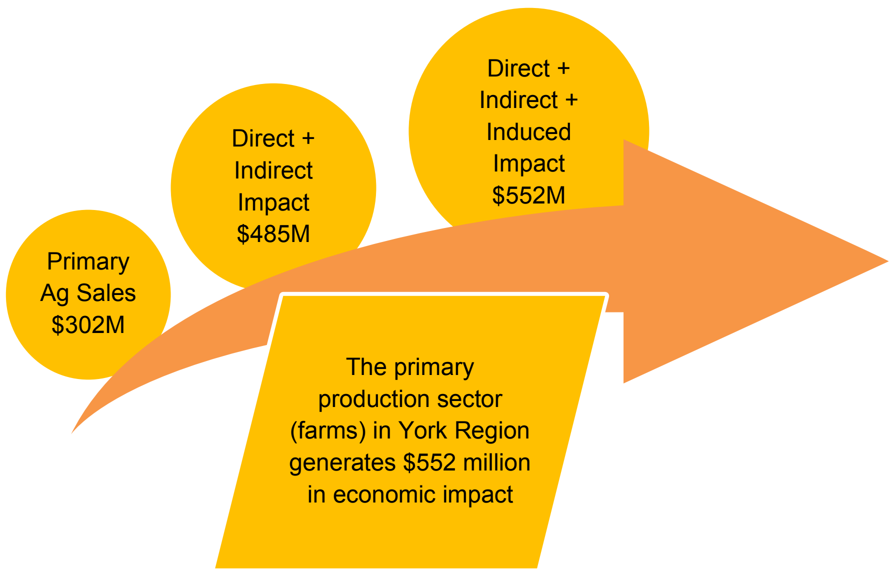

Figure 5: York Region Primary Production (Farms) Sector Economic Contribution

The strategic goals, objectives and recommended action items have been included below. While this provides an overview of York Region's Agriculture and Agri-Food Sector Strategy, the strategy should be reviewed in full to ensure a complete understanding of the trends and issues informing this strategy now and in the future.

[1] Please note, total economic impact has been calculated for primary production rather than the entire agri-food value chain. Primary production was selected for analysis as calculating for the entire agri-food sector tends to overstate economic contribution (due to double counts).

Overview of Strategic Goals, Objectives and Recommended Actions

Note: This strategy covers the time period of **September 2017-September 2022 (five years in total)**, however, a number of these actions and activities should be considered as ongoing beyond 2022.

GOALS				
Strengthen communication and collaboration with York Region, lower tier municipalities and the agri-food sector	**Support the agri-food sector through integrated land use planning and economic development**	**Support increased capacity for value added agri-food processing and support services.**	**Leverage location within the GTA and proximity to customers through direct farm marketing to meet demand for local food production**	**Provide support for business retention and expansion of primary agricultural production within York Region.**
OBJECTIVES				
i) Foster more communication to enable collaboration, business growth and local food awareness ii) Facilitate and support existing and emerging organizations to deliver programming in an effective and cost-efficient manner.	**Encourage regional and municipal land use policies, development fees & approval processes to align with updated provincial policy and support York Region's agri-food sector now and in the future**	**Connect local producers with value added & processing opportunities, while attracting new investment.**	**Support and facilitate opportunities to meet local food demand through direct farm marketing.**	**Support existing agricultural operations in the Region by leveraging opportunities for value-added production and/or expansion.**

Strategic Goal #1: Strengthen communication and collaboration with York Region, lower tier municipalities and the agri-food sector.

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
1.1.	Create a York Region agri-food specialist role dedicated to supporting the Agri-food sector in York through business retention and expansion • This position requires someone with an educational background in agriculture due to the complexity of the agriculture sector in York Region • This role would liaise between economic development and planning, while investing time and leadership into YRAALG		✓		
1.2.	Build internal staff capacity at the Regional level to provide direction to lower tiers on agri-food issues; coordinate programming and initiatives between planning, economic development and tourism at the Regional level through an annual staff agri-food workshop (could include tours of local farms, processing plants, and guest speakers)	✓			
1.3.	Develop a communication roadmap/strategy to ensure open and transparent communication pathways • Strengthen communication by developing and distributing a document/handout that helps connect agri-food stakeholder with the appropriate department/staff person if they have a question (e.g. Help understand Regional issue vs. municipal issue)		✓		
1.4.	Create a directory/resource that includes names and contact information of producers in the Region; to be used by the Region for collecting employment data, information, etc.			✓	
1.5.	Create annual opportunity to collect feedback from the agri-food sector to strengthen York Region staff and Council's understanding of farm and food businesses and their needs by engaging with local famers and agri-food experts	✓			

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
	• Through open house consultation, work with agri-food sector to identify aspects of public infrastructure supportive of the agri-food sector (e.g. roads, drainage, broadband connectivity) requiring attention • Ensure meetings/open houses are held at a time that is convenient and accessible for primary producers				
1.6.	Continue to support and collaborate with the Golden Horseshoe Food and Farming Alliance through projects and update inventory of agri-food assets and resources in York Region including agri-tourism, livestock, equine, etc.	✓			
1.7.	Continue support for the York Region Agricultural Advisory Liaison Group (YRAALG) by allocating annual budget for special projects and events • Develop standard practices to collect feedback on issues prior to reports being drafted • Develop advisory memos that outline issues and feedback required with clear timelines • Refer agri-food related issues to the advisory group for feedback			✓	
1.8.	Explore and identify ways to celebrate and showcase agricultural innovators/champions in the Region using existing communication efforts • Consider using existing communication efforts such as online newsletters and social media to share videos/photos/blogs about agriculture in York Region • Build support and understanding for the agri-food sector by showcasing best practices used by local producers (e.g. minimizing impacts on the environment through sustainability innovations)	✓			

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
1.9.	Seek opportunities to collaborate with partners in York Region and beyond the Region • E.g. Facilitate networking sessions for local producers and restaurant/hospitality stakeholders in the Region/GTA (a “dating service”)	✓			
1.10.	Develop York Region agri-food educational materials for general public to share at regional and community events (e.g. Fall Fairs). • Include accessible data such as contribution of the Region’s agri-food sector and case studies of innovative operations in the Region	✓			
1.11.	Investigate and explore opportunities for teaching youth about agriculture and food production in the Region • E.g. Agriculture in the Classroom			✓	
1.12.	Demonstrate a commitment to the agri-food sector by supporting agricultural events and conventions through sponsorship or in-kind support	✓			
1.13.	Collaborate with organizations such as Rouge National Park, Oak Ridges Moraine Trust, Ontario Soil and Crop Improvement Association (OSCIA), and Ontario Farmland Trust to conduct a study to understand current land stewardship practices used by York producers. • E.g. Environmental Farm Plan, Species at Risk Farm Incentive Program	✓		✓	

Strategic Goal #2: Support the agri-food sector through integrated land use planning and economic development

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
2.1.	At next review, update York Region's Official Plan to conform and align with recent changes to the *Greenbelt Plan, Growth Plan* and *Oak Ridges Moraine Plan* (2017 updates) • Work with lower tier municipalities as they review and update processes • *A full list of changes to consider is included in Appendix F of this report*			✓	
2.2.	Prior to next Official Plan review, reexamine Land Evaluation and Area Review (LEAR) study and determine if updates are needed to reflect changes at the provincial level (agricultural system mapping)			✓	
2.3.	Through the Municipal Comprehensive Review, review York Region's Official Plan (and lower tier plans) agricultural and rural policies to ensure they encourage and support investment and employment in the agriculture sector	✓			
2.4.	Conduct a study that investigates innovative financial mechanisms that incentivize producers and land owners to keep land in agricultural production • Suggestions from consultation include: reduced development charges; reduced farmland tax rates; and a land speculation tax to increase the tax rate for foreign buyers • Identify ways to further incentivize landowners to provide long-term leases to farmers			✓	
2.5.	Conduct a review of policies and regulations related to environmental performance of food processing operations within the Region • Streamline process and explore incentives and subsidy programs to assist companies as they transition to clean technologies		✓		

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
2.6.	Participate in the upcoming consultation and review for the Greater Golden Horseshoe's Agricultural System policies (led by OMAFRA) which *recognizes farmland and clusters of agri-food infrastructure and services need to co-exist alongside rapidly-growing communities and infrastructure*		✓		
2.7.	Recognize and acknowledge the agri-food sector's role as an economic driver in the Region through updates to plans and policies, such as York Region's *Economic Development Action Plan*			✓	
2.8.	Conduct a study and review of edge planning practices and identify planning tools the Region can use to resolve conflicts between adjacent urban and agricultural land uses			✓	
2.9.	Monitor the province's development of *Agricultural Impact Assessment* (AIA) guidelines and provide feedback through consultation with planning staff, YRAALG and other relevant stakeholders	✓			
2.10.	Encourage local municipalities to develop and implement an Agricultural Community Improvement Plan (CIP) to incentivize on-farm diversification and value-added operations	✓			
2.11.	Create factsheets and accessible materials to help agri-food stakeholders interpret land use policies • Based on stakeholder feedback, potential topics could include: Farming in the Greenbelt; Interpreting Permitted Uses in Provincially protected areas (Greenbelt, Oak Ridges Moraine)	✓			

Strategic Goal #3: Support increased capacity for value-added agri-food processing and support services

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
3.1.	Develop and implement a Food Processing Action Plan that demonstrates York Region is 'open for business' to attract and retain food processing businesses • Sub-sectors to target for continued growth include: bakery and tortilla manufacturing; fruit and vegetable processing; and the beverage sector			✓	
3.2.	Establish an agri-entrepreneur mentor program in conjunction with the York Small Business Enterprise Centre to support existing and potential entrepreneurs with mentoring and business guidance	✓		✓	
3.3.	Investigate and identify opportunities to develop a regional food incubator/hub to support fruit and vegetable value-adding opportunities to increase farm revenue • Services could include washing, cutting, quick chill, flash freeze, labelling, cold/frozen/dry storage, packaging while providing a space for training and development (including a commercial kitchen • Identify funding opportunities (Friends of the Greenbelt Foundation; Trillium Foundation, etc.) • E.g. Ontario Agri-Food Venture Centre in Northumberland County				✓

Strategic Goal #4: Leverage location within the GTA and proximity to customers through direct farm marketing and meet demand for local food production

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
4.1.	Facilitate the formation of the York Farm Fresh Organization to support the growth of York's agri-food sector and demand for farm-direct production. Particular efforts to support include: • Guiding the organization through the development of directional signage • Facilitate the development of an online platform that consumers can use to find local farms/products (an interactive map)	✓			
4.2.	Continue annual production of the York Region Farm Fresh Guide Map and initiatives like the Pumpkin Pie Trail Map to promote and raise awareness of locally produced agricultural products • Release the Farm Fresh Guide map and Pumpkin Pie Trail Map in additional languages to reflect the Region's diversity and attract larger numbers • Release the maps by April 15th each year		✓		
4.3.	As encouraged in the Regional Official Plan, continue to support the provision of community gardens and/or urban agriculture projects that promote agricultural awareness in settlement/urban areas through educational programs/initiatives • Identify ways to synergize community gardens and the food incubator/hub (Action 3.4) if successfully implemented	✓			
4.4.	Support the development of agri-tourism programming such as "Farm Tour Hikes" (an organized, self-guided farm tour in cooperation with local farm organizations)	✓			

4.5.	Raise awareness around the diversity of production and procesing found in the Region through promotional materials (e.g. Ontario's 'soup and salad bowl' in the Holland Marsh; world crop production)	✓			
4.6.	Revisit York Region's Food Charter and broaden support across the agri-food sector	✓			
4.7.	Develop local food-sourcing policies for Regional facilitites and encourage other public sector agencies within the Region to adopt similar policies			✓	
4.8.	Facilitate relationship building between producer, processors and retail companies that support local food production (e.g. Longos, Metro) through networking events			✓	
4.9.	Communicate and promote exisiting online tools to help connect producers with the local market through workshops and seminars. Examples of existing programs include: • Ontario Fresh is an online network and marketing service designed to help Ontario businesses buy and sell more food • Farm to City links farmers to customers seeking locally-produced beef			✓	
4.10.	Partner with **Rouge National Urban Park** and **Toronto and Region Conservation Authority** to increase collaboration and learning amongst new entrants in to the agri-food sector and with agri-tourism businesses and potential new entrants into agri-tourism through hikes, education programs and/or peer-to-peer learning groups			✓	

Strategic Goal #5: Provide support for business retention and expansion of primary agricultural production within York Region

Action Item	Summary of Recommended Actions	Ongoing	Short Term (1 Year)	Medium Term (2-4 Years)	Long Term (4+ years)
5.1.	Conduct Agriculture and Agri-Food Retention and Expansion studies (supported by OMAFRA) to assess and evaluate the needs and opportunities in each lower-tier municipality			✓	
5.2.	Conduct a study and develop a long-term sustainability strategy for the Holland Marsh through collaboration with stakeholders and partners (e.g. Simcoe County, Lake Simcoe Regional Conservation Authority, Holland Marsh Growers' Association, OMAFRA, etc.)			✓	
5.3.	Continue to work with industry and government agencies to support the employment of seasonal and foreign agricultural workers, with respect to working conditions, accommodations, cultural services and accessibility to workers	✓			
5.4.	Undertake an equine industry study and consultation to identify barriers and opportunities for growing the Region's equine industry including research on successes in other regions (e.g. Greater Toronto Area, Caledon, Halton Hills, etc.)			✓	
5.5.	Explore opportunities to increase the production of world crops within York Region			✓	
5.6.	Continue support to improve broadband connectivity across the Region through the Region's Broadband Strategy; particularly in rural and agricultural areas to help businesses develop and grow	✓			

5.7.	Develop template and prepare annual report card to record and evaluate achievements • Develop indicators and measures of success for the agri-food sector to track the overall health of the sector and identify appropriate adjustments	✓			
5.8.	Conduct a five-year review of York Region's Agriculture and Agri-Food Sector Strategy				✓

1.0 Introduction & Project Overview

> ***The agri-food sector includes: input suppliers, producers, processors, retailers and all levels of government (municipal, regional, provincial and federal)***

This strategy provides an actionable roadmap that will guide York Region's support of the long-term economic prosperity and viability of the agri-food sector[2] and position it for continued growth. This is a timely investment as there is unprecedented interest on Canada's agri-food sector at this time. For example, the recent release of a report from the Advisory Council on Economic Growth (led by Dominic Barton), highlighted Canada's agri-food sector as the number one sector positioned for significant growth.[3]

Additionally, the updated four provincial plans (*Greenbelt Plan, Places to Grow: Growth Plan for the Greater Golden Horseshoe, Niagara Escarpment Plan and Oak Ridges Moraine Conservation Plan)* recommend the development and implementation of regional agri-food strategies to "sustain and enhance the agricultural system and the long-term economic prosperity and viability of the agri-food sector, including the maintenance and improvement of the agri-food network."[4]

Through the development of an agriculture and agri-food sector strategy, York Region is demonstrating a strong commitment to the sector as well as an understanding of the linkage between agricultural production and regional economic vitality.

This report includes the research and results of a literature review, stakeholder consultation, analysis of the updated Census of Agriculture and an economic impact analysis. Each of these data collection phases informed the final strategy, which is outlined in section 7. The process for conducting this agriculture and agri-food strategy is summarized in Figure 6 below. This report is meant to provide an overview of research conducted, as well as rationale for strategies and action items.

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[2] In this report, the agri-food sector includes: input suppliers, producers, processors, retailers and all levels of government.

[3] Advisory Council on Economic Growth, (2017). *Unleashing the Growth Potential of Key Sectors*.

[4] Ministry of Municipal Affairs and Housing, (2017). *Greenbelt Plan, 2017*

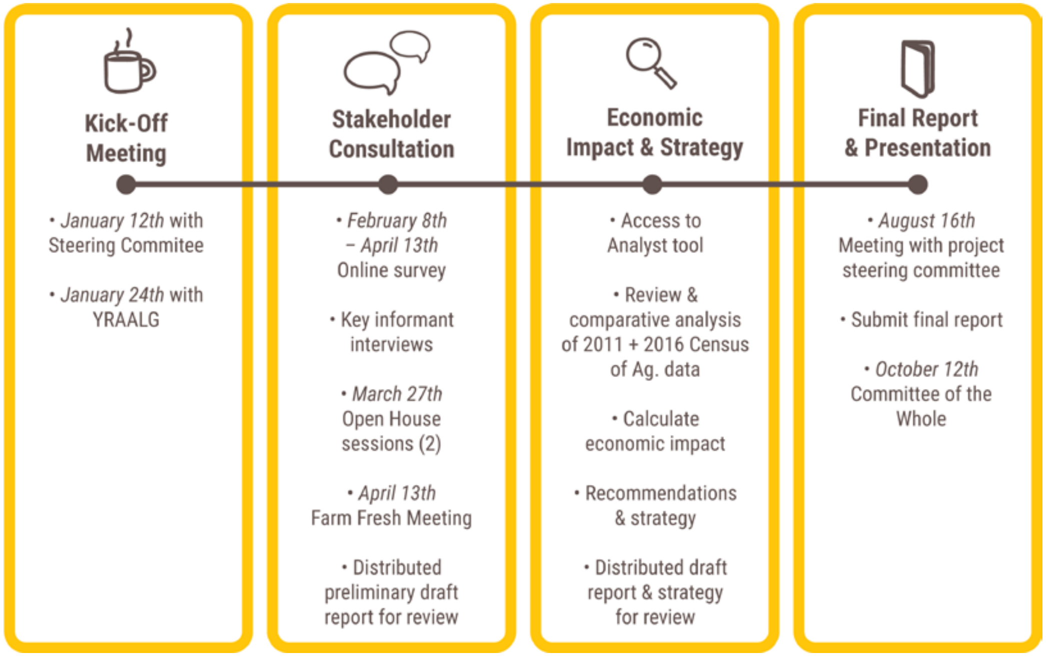

Figure 6: Project process map

2.0 The 'Local to Global' Context – Agriculture and Agri-Food Trends

This section provides background for the positioning of York Region's agri-food sector within Canada and Ontario's agri-food context. The following section highlights future growth opportunities for the agriculture and food industry as well as the economic impact and anticipated challenges.

2.1 Canada's Agri-Food Sector – Positioned for Significant Growth

A report released by the Advisory Council on Economic Growth suggests that Canada's agri-food (agriculture and agri-food) sector is positioned for significant growth.[5] This report identifies eight key sectors based on their "strong endowment, untapped potential, and significant global growth prospects."[6]

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[5] Advisory Council on Economic Growth, (2017). *Unleashing the Growth Potential of Key Sectors*.
[6] The sectors identified in the report include: Agriculture and food; energy and renewables; mining and metals; healthcare and life sciences; advanced manufacturing; financial services; tourism and; education.

Canada is already globally recognized for food safety and has high resource availability, arable land and strong research clusters such as the University of Guelph.[7] Global opportunities that Canada's agri-food sector can leverage include exploring emerging market demand for higher-value food (e.g. specialty crops, proteins, functional foods) and maintaining a safe and sustainable food system to meet global demand.

Agri-food is one sector "where all the trend lines are saying there's going to be massive demand…this demand will go up at least 50 per cent in the next 20 to 25 years."

- Dominic Barton, Advisory Council on Economic Growth

To realize the potential of the agri-food sector, the Advisory Council suggests an approach "that uses carefully selected policy actions to remove obstacles," such as policy barriers/excessive regulations, interprovincial trade barriers and inefficient forms of subsidies, as well as inadequate physical infrastructure and shortages in skilled labour.[8]

These trends are further highlighted in an article by Evan Fraser (The Arrel Food Institute at the University of Guelph) and Rory McAlpine (Senior Vice President, Maple Leaf Foods).[9] It is forecasted that there will be over two billion more mouths to feed over the next generation.[10] Additionally, a rapidly growing Asian middle class who demand higher quality and more resource-intensive food will change the landscape of food production. Global populations will need to produce as much food in the next 45 years as in the previous 10, 000.[11] Other factors that will influence food production include climate change, water scarcity and volatile energy prices.[12]

The agri-food sector will continue to see technologies being applied to the management of crop and livestock production and in food processing factories at increasing rates. Technology such as artificial intelligence and big data analytics will continue to reshape how we produce food and the kinds of food we produce.

2.2 Economic Impact of the Ontario Agri-Food Sector

In terms of the economic impact of the agri-food sector, Ontario is also well positioned for continued growth. Ontario's agri-food system generates more than $177 billion dollars in sales of primary agriculture, food and beverage processing, wholesaling, food services, and retail food. The sector employed more than 807, 000 people in 2016.[13] There is an important array of businesses and services that enable a thriving agri-food sector, such as input providers,

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[7] Advisory Council on Economic Growth, (2017). *Unleashing the Growth Potential of Key Sectors*.
[8] Ibid.
[9] Fraser, E. & R. McAlpine, (2017). *The time is now to position Canada as a global leader in Agri-Food.*
[10] Ibid.
[11] Advisory Council on Economic Growth, (2017). *Unleashing the Growth Potential of Key Sectors*.
[12] Ibid.
[13] OMAFRA, 2017.

equipment dealers, food processors (e.g. abattoirs), food distribution services and retail.[14] In 2015, spending by primary producers and resource suppliers generated $29.3 billion in economic activity across Ontario. All levels of government benefit from this economic activity which creates $4.4 billion in tax revenues.[15]

Ontario's agri-food sector comprises of $49 billion in GDP

The level of economic impact for Ontario's agri-food sector, in terms of Gross Domestic Product (GDP) was almost $49 billion dollars in 2016.[16] Most of this food processing occurs within the Greater Golden Horseshoe, with a significant amount of processing occurring in York Region.

Ontario's agri-business industry[17] specifically, is estimated to generate approximately $6.9 billion in total output ($4.1 billion in direct output, $2.1 billion in indirect output and $728 million in induced output) and the ***total output generated by the Ontario agri-business industry increased by approximately 41 per cent since 2013.***[18]

Agri-business refers specifically to crop input supply, grain elevators and feed manufacturing services. The agri-business sector is a key part of the wider agri-food industry

Ontario's agri-business industry creates approximately 29, 823 total full-time equivalent positions (direct, indirect and induced). The outlook for this sector is positive as total

Leading by Example

Lakeview Vegetable Processing Inc.

Located in the Town of East Gwillimbury, near Queensville, Lakeview produces and processes vegetables for transport. Currently, they farm 2,000 acres of vegetables. Their processing facility is 42,000 square feet, with an additional 50,000 square feet of storage for raw products. Their processing line produces fresh-cut products for market and individual quick frozen products.

Lakeview's plant location in York Region is extremely beneficial for delivery of processed products, with low prices and short delivery distances. They have their own fleet of transport vehicles for quick service and controlled high quality standards. Lakeview is a good example of a leading business in the agri-food sector from the region's perspective, as this company increases capital requirement through wholesale vegetable production and processing.

[14] Friends of the Greenbelt Foundation, (2015). *Dollars & Sense: Opportunities to Strengthen Southern Ontario's Food System.*
[15] Ibid.
[16] OMAFRA, 2017.
[17] The agri-business industry specifically refers to crop input supply, grain elevator and feed manufacturing industries.
[18] Prepared by MNP for Ontario Agri-Business Association (2016). *Updated Economic Impact Study of the Ontario Agri-Business Industry.*

employment generated by the Ontario agri-business industry increased by approximately 31 per cent since 2013.

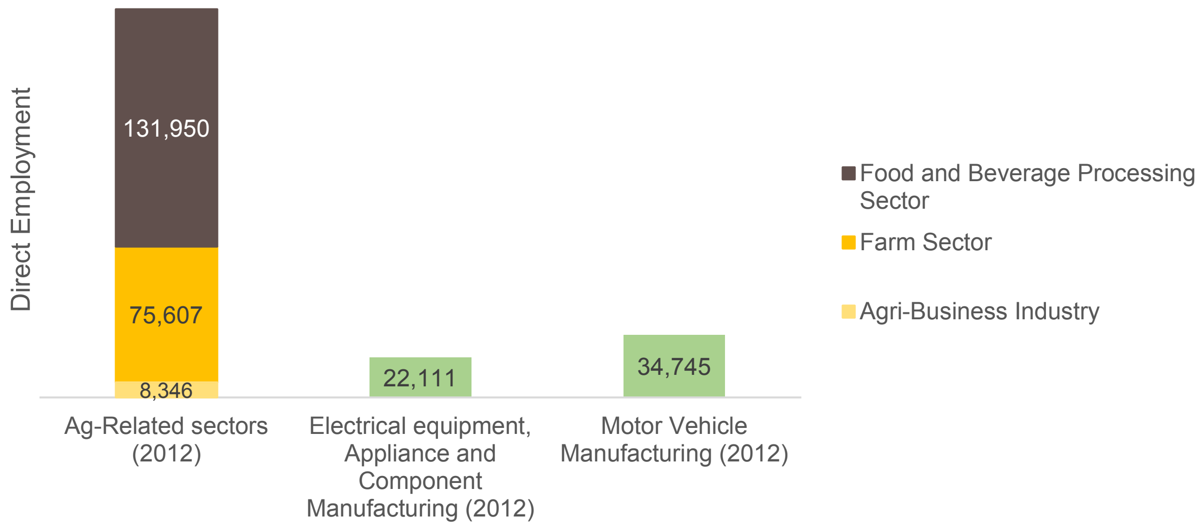


Figure 7: Direct employment, comparison by industry. (Source: Ontario Agri-Business Association, 2016)

As can be seen in Figure 7, direct employment supported by the Ontario agri-business industry, the farm sector and food and beverage processing sector (ag-related services) was roughly 10 times that generated by the Ontario electrical equipment, appliance and component manufacturing sector and approximately six times that generated by the Ontario motor vehicle parts manufacturing sector.

A study commissioned by Food and Beverage Ontario found that food and beverage processing is a significant contributor and economic engine for Ontario's provincial economy.[19] The food and beverage processing sector provides an essential link in the food supply chain, which begins at the farm gate and ends at the consumers' plate.

Key statistics for the food and beverage sector include:

- The sector generates $40.7 billion in revenues, accounting for 14 per cent of Ontario's total manufacturing
- There are close to 3,000 food and beverage processing businesses in the province, of which many are located in rural communities
- Even with the 2009 recession, the sector's total revenues and value of shipments grew 11 per cent from 2007 to 2012
- Approximately 131, 950 direct full-time equivalent (FTEs) positions are generated by food and beverage processors in the Ontario economy

[19] Food and Beverage Ontario, (2015) *Updated Economic Impact Study of the Ontario Food and Beverage Sector.*

- Ontario food and beverage processors further generate 172, 620 and 69, 798 direct and induced FTEs

Food and Beverage Ontario provides the following summary of the strengths, challenges, opportunities, and threats facing the food processing sector in Ontario.

Table 1: Strengths, Challenges, Opportunities and Threats facing Ontario's food and beverage processing sector. (Source: Food and Beverage Ontario, 2015)

STRENGTHS		CHALLENGES	
STRENGTHS	**Attractive Location** Favourable climate & abundant resources **Reputation for safety & quality** Quality research & education opportunities **Opportunities for commercialization** A rising complement of SMEs	CHALLENGES	**Costly to operate in urban centres** Steep increases in input costs **Risks associated with consolidation** Recent plant closures **Regulatory environment** Difficulty in securing financing **High industry entry costs** Seasonal production **Low levels of investment in traditional R&D by SMEs**
OPPORTUNITIES	**Expanding export opportunities** Shifting consumer preferences (healthy foods, simple foods, alternative retail options) **Demand for innovative products** Changing demographics **Increasing innovation along the value chain** Contributions to sustainability **'Buy local' movement**	THREATS	**Increasing international competition** Increased pressure on profitability **Shifting consumer preferences** Requires investment in food safety **Anticipated labour gap**

2.3 Trends and Issues for the Agriculture and Agri-Food Sector

Through a comprehensive environmental scan, it is evident that a number of factors and trends impact the agri-food industry. These trends and factors will continue to impact agriculture and agri-food at a national and provincial level.

Table 2: Factors and trends for the agriculture and agri-food sector. (Based on report by Food and Beverage Ontario, 2015).

Factors and Trends Impacting the Agri-Food Sector	
Strong agricultural production in Ontario	Complicated regulatory environment
Large, educated and skilled workforce	Capital intensive
Proximity to local and international Markets	Seasonality (climate change)
Food safety	Competing interests at rural-urban fringe
Increased investment in technology	
Primary Production Sector Trends	
Consolidation at the farm Level	Market volatility
Farm value appreciation	Increased global demand for animal protein products
Changing age demographics at the farm level	
Food Processing Sector Trends	
Increased recognition for food safety & quality	Ontario food clusters (E.g. Guelph)
Quality research and education opportunities	Competition from emerging countries
Increased purchasing of local food ingredients	Regulation
Commercialization opportunities	Sustainability
Government Policy Trends	
Focus on local food procurement policies	Increased focus on food safety
Investment in agriculture and agri-food (Federal and provincial level)	Reduction on government extension services
International trade agreements	Low carbon initiatives
Consumer Trends	
Aging population	No trade-off for convenience
Evolving society (E.g. brands become less of a status symbol & more an expression of individuality)	Plant-based diets
Changing meal patterns	Local foods
Shifting expenditures	Organic foods
Food for health	Small indulgences (gourmet food and boutique brands)
Educated consumers	Food safety and production issues
World foods	

3.0 Understanding York Region's Agriculture and Agri-Food Industry

There are a number of provincial plans and strategies that determine agricultural policy and practice in York Region. The following section provides an overview of key land use planning policies that impact York Region's agri-food industry at the provincial level. This is not an exhaustive summary, but provides an overview of the history and recent changes to Ontario's land use policy approach. This is followed by a deeper look at policies, plans and strategies in York Region that are relevant to this strategy.

3.1 Agriculture and Agri-Food: Provincial Policy Context

This section will focus specifically on Ontario's *Provincial Policy Statement, 2014 (PPS)* as well as two provincial plans – *The Greenbelt Plan* and the *Growth Plan for the Greater Golden Horseshoe.* Although it is recognized that the PPS and following two plans relate to a number of other interests (e.g. growth/development, natural heritage, infrastructure), the focus of this discussion relates to agriculture and agriculture-related matters.

3.1.1 Provincial Policy Statement, 2014

Under the Planning Act, the policies contained in the *Provincial Policy Statement, 2014* (PPS) provide direction for the protection of prime agricultural land and also the promotion of activities to ensure the economic success of rural areas.[20] The PPS recognizes the importance of the agricultural sector in the province's economy. As such, it provides strong policy direction for long-term protection of prime agricultural areas and restrictions for non-agricultural uses of these lands (2.3.1 and 2.3.6). It also encourages diversification of on-farm uses (2.3.3.1) to not only ensure that prime agricultural areas are protected for the long-term but that the industry remains sustainable.[21]

Outside prime agricultural areas (rural areas), the PPS also supports a strong rural economy. The policies promote a diversified economic base and employment opportunities through goods and services, including value-added products and the sustainable management or use of resources (1.1.4.1) as well as the promotion of agricultural-related uses, on-farm diversified uses, and normal farm practices (1.1.5.8). Fundamentally, the PPS recognizes that agricultural land is not only a significant natural resource but also a key element of our provincial economy.

The Provincial Policy Statement states that agricultural resources and other resources, provide important environmental, economic and social benefits. The wise use and management of these resources over the long term is a key provincial interest.

[20] The PPS provides policy direction on matters of provincial interest related to land use planning and development.
[21] Province of Ontario, (2014). *Provincial Policy Statement, 2014.*

3.1.2 Provincial Plans in the Greater Golden Horseshoe

The Agricultural System includes a land base made up of specialty crop areas, prime agricultural land areas, and rural areas that together create a continuous and productive land base for agriculture.

In addition to the *Provincial Policy Statement, 2014* (PPS), provincial plans such as the *Greenbelt Plan, 2017* and the *Growth Plan for the Greater Golden Horseshoe, 2017* have been developed to protect farmland and also direct growth within the Greater Golden Horseshoe (GGH) to urban areas and provide intensification and density targets. This approach will help to curb urban sprawl within an area of the province that has some of the country's most productive farmland. A map of the GGH and provincial plans such as the Greenbelt, are included on figure 8 below.

The Greenbelt Plan was established in 2005 and identifies where urbanization should not occur in order to provide permanent protection to the agricultural land base and the ecological features and functions occurring on the landscape.[22] The Protected Countryside identified by the Greenbelt Plan consists of an agricultural system and a natural system together with a series of settlement areas. The agricultural system is made up of specialty crop areas, prime agricultural land areas, and rural areas. The Greenbelt Plan also identifies where urbanization should not occur in order to provide permanent agricultural and environmental protection of these lands. Other provincial plans such as the Niagara Escarpment Plan and the Oak Ridges Moraine Conservation Plan are environmentally focused and form part of the overall Greenbelt Plan. These plans also protect agricultural land and improve linkages between natural areas and the surrounding major lake system and watersheds.

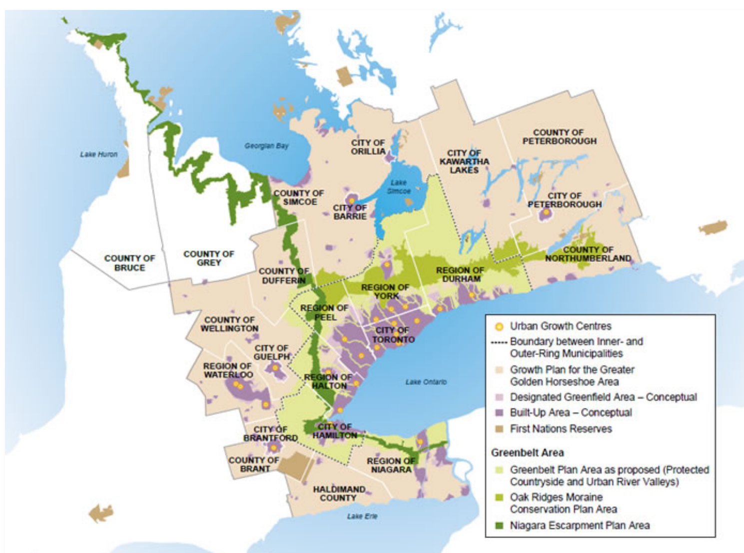


Figure 8: Provincial Plans in the GGH

Similar to the PPS, the Greenbelt Plan recognizes the importance of the agricultural sector and provides policy tools to aid and promote the protection of agricultural land and to provide a sense of security for those wishing to invest in agriculture in the Greenbelt area.

[22] [Ministry of Municipal Affairs, Ministry of Housing. (2005). *The Greenbelt Plan, 2005.*]

The Growth Plan was established in 2006 under the *Places to Grow Act, 2005* in recognition that the GGH is one of the fastest-growing regions in North America. It is widely acknowledged that without proper growth management, negative impacts associated with growth will continue. For example, these impacts include declining air and water quality, and the loss of natural resources including agricultural lands.

The Growth Plan directs development to built-up areas and encourages intensification as a means to preserve open space and agricultural lands.[23] The plan provides policy direction for the identification of natural systems and prime agricultural areas as well as the enhancement of the conservation of these resources. There is also policy direction that confirms the Province's commitment to agriculture by encouraging municipalities to maintain, improve and provide opportunities for farm-related infrastructure and also to establish, work and consult with agricultural advisory committees on matters related to agriculture and growth management.[24]

Although the Growth Plan defers to the PPS and Greenbelt Plan for specific agricultural land use policies within the Growth Plan area, it encourages the protection of farmland by directing growth to urban areas, optimizing transit and infrastructure, and establishing intensification and density targets to create a compact urban form and curb urban sprawl.

Leading by Example

100KM Foods Inc.

While this example is not found in York Region, it provides an example of existing organizations and programs to connect with and leverage their success. The founders of 100km Foods Inc., located in North York, realized that there was a lack of infrastructure for local food producers in the GTA and surrounding area. They attempted to fill this gap by finding individual primary producers and coordinate deliveries from there. Initially the company drew from organizations such as **York Region Farm Fresh** for grower contacts.

But the delivery is not just one way – 100km Foods Inc. will speak with chefs and managers at local restaurants, get their feedback on what products they want, and subsequently find the farms that can offer that supply.

Their annual sales are now $2.3 million annually, and they have teamed up with Sysco food distributors for large scale distribution. 100km Foods Inc. is a unique asset to the Greater Toronto Area, as they provide the region's restaurants and food retailers with direct-to-consumer farm products.

[23] Ministry of Municipal Affairs, Ministry of Housing. (2006). *Growth Plan for the Greater Golden Horseshoe, 2006.*
[24] Ibid.

3.1.3 Co-ordinated Land Use Planning Review, 2015

The Advisory Panel led by David Crombie supported the co-ordinated review of the four provincial plans, including the Greenbelt Plan, Growth Plan, Niagara Escarpment Plan and Oak Ridges Moraine Conservation Plan. All four of these plans identify agricultural protection as a priority.[25] The proposed changes to the four plans include the following themes:

- Building complete communities
- **Supporting agriculture**
- Protecting natural heritage and water
- Growing the Greenbelt
- Addressing climate change
- Integrating infrastructure
- Improving plan implementation

The panel made several recommendations with respect to farmland protection and the viability of agriculture. While the Greenbelt Plan already protects the agricultural land base, proposed changes to the plan describe and protect the land base of an *agricultural system*, which includes the land base, infrastructure and other assets (such as food and beverage processors, cold storage, grain dryers and abattoirs). In terms of supporting local farms, proposed changes to the Growth Plan require the province to identify an agricultural system for the entire GGH that builds on the Greenbelt, in collaboration with municipalities.[26]

Through the four-plan review consultation, there was a strong demand for clarification on policies and guidelines that help reduce conflict between agricultural and non-agricultural uses. One proposed change to minimize impacts that infrastructure and other developments have on agricultural operations would require municipalities and other proponents to undertake an agricultural impact assessment for proposed settlement area expansion or major infrastructure projects.[27]

A Regional Agriculture and Agri-food Sector Strategy demonstrates York Region's commitment to a thriving and productive agri-food sector.

[25] Ministry of Municipal Affairs, Ministry of Housing, (2016). *Shaping Land Use in the Greater Golden Horseshoe.*
[26] Ibid.
[27] Ibid.

Of significance for this project, one of the recommendations from the co-ordinated land use review recognizes the opportunity for sub-area assessments to develop 'regional agri-food strategies,' which would combine the protection of agricultural land with economic incentives and infrastructure development.[28] These sub-area assessments are meant to enable the agri-food sector to support a province-wide goal to be a champion for sustainable food production.

3.1.4 Agricultural System Planning and Policies

As stated above, a significant change in the updated four provincial plans is the inclusion of *Agriculture System* policies. This approach recognizes that farmland (including prime agricultural land, rural lands and specialty crop areas) and clusters of agri-food infrastructure and services need to co-exist alongside rapidly-growing communities and infrastructure. The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) recently released a draft titled *Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe* for consultation that encourages deliberate planning to "enable the continued growth and prosperity of the agri-food

Desired outcomes for the *Agricultural System* approach include:

1. Active planning for agriculture and rural economic development based on reliable mapping, data and tools
2. Improved viability of agriculture and growth of the agri-food sector
3. Better protection of the agricultural land base
4. Increased consistency and certainty across municipalities
5. Reinforcement of the synergies between agricultural, natural heritage and water systems, as outlined in provincial policy
6. Collaboration between the province, municipalities, farmers and businesses with a common interest in a strong agri-food sector

- OMAFRA, 2017

Leading by Example

ClearWater Farms

Located in the Town of Georgina, ClearWater Farms is a not-for-profit organization that is an example of a public-private partnership. ClearWater Farms is "a social enterprise intent on demonstrating how healthy food can be grown in ways that restore the surrounding land, water and community fabric." A flagship initiative of the Ontario Water Centre, ClearWater Farms provides an environment to teach youth and 'agri-preneurs' about sustainable food production, while providing high quality products that can be purchased at the farm or online. ClearWater Farms are re-envisioning the local food economy in Georgina and throughout the Lake Simcoe Watershed. Products grown at the farms (there are three locations) are available for pick-up and purchase through a weekly basket program.

CLEARWATER FARMS

Ontario Water Centre

[28] Ministry of Municipal Affairs, Ministry of Housing, (2015). *Planning for Health, Prosperity and Growth in the Greater Golden Horseshoe: 2015-2041.*

sector."[29] This approach to planning will improve farmland protection while creating the conditions under which the agri-food sector can thrive.[30]

Overall, the updated plans provide a more holistic approach to understanding farmland protection and includes measures that help create more prosperous conditions by recognizing the importance of the Golden Horseshoe's agri-food sector to regional and provincial economies and the assets along the value chain and services the sector needs to thrive.

The province has defined ***agricultural system*** as: *the system mapped and issued by the Minister in accordance with [each plan], comprised of a group of inter-connected elements that collectively create a viable, thriving agricultural sector. It has two components:*

1. An agricultural land base comprised of prime agricultural areas, including specialty crop areas, and rural lands that together create a continuous productive land base for agriculture;

2. An agri-food network which includes infrastructure, services and assets important to the viability of the agri-food sector.

Agri-food network is defined by the province as *a network that includes elements important to the viability of the agri-food sector such as regional infrastructure; on-farm buildings and infrastructure; agricultural services, farm markets, distributors, and primary processing; and vibrant agriculture-supportive communities.*

While the Greenbelt Plan focuses on protecting the agricultural system and natural heritage system and the Growth Plan focuses on growth management, both plans have similar *Agricultural System* policies, which shaped the final recommendations and action items for this strategy, found in Section 7 of this report. The *Agricultural System* approach differs from conventional land use planning approach in three key ways:

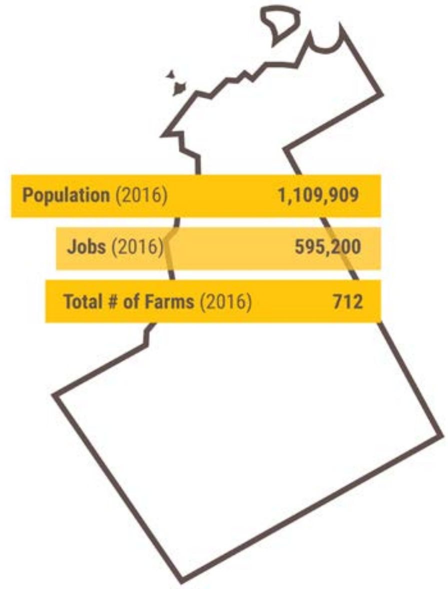
1. It aims for continuity of protection of prime agricultural areas across the GGH using common nomenclature for land use designations
2. It recognizes the important role of rural lands in agriculture and supporting elements of the agri-food network
3. It reinforces the need to integrate agricultural viability consideration with farmland protection

The key takeaway is that an *agricultural system* approach broadens the land protection concept by recognizing the important role of rural lands in agricultural production and the agri-food network.

[29] OMAFRA, 2017. *Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe.*
[30] Ibid.

3.2 York Region – Current Context

The Regional Municipality of York is 1776 km^2 in size and comprises of the following nine lower-tier municipalities:



- Town of Aurora
- Town of East Gwillimbury
- Town of Georgina
- Township of King
- City of Markham
- Town of Newmarket
- Town of Richmond Hill
- City of Vaughan
- Town of Whitchurch-Stouffville

York Region is one of Canada's fastest growing communities, with the population anticipated to grow to 1.5 million with 510,000 households and 799,000 jobs by the year 2031.[31] The forecasted employment growth for York Region is approximately 200,000 jobs, slightly higher than forecasts put forward in the Growth Plan forecasts.[32] In order to accommodate this growth, the Region has developed key policies and plans such as the *Transportation Master Plan, York Region Sustainability Strategy, Water and Wastewater Master Plan* and guiding documents such as *Vision 2051.* The Region also completes a Growth and Development Review twice a year to provide an update on factors that affect the economic health of York Region.

In 2011, approximately 43 per cent of York Region's land base was designated as Agricultural or Specialty Crop Lands (e.g. the Holland Marsh).[33] *Vision 2051* highlights the contributions of agricultural and natural heritage lands to the economy and valued lifestyle in York Region. ***The vision for 2051 includes thriving agricultural areas that provide healthy food and resources to a growing and diverse population.[34]***

Additional documents, strategies and key agricultural assets that were considered in the development of York Region's agriculture and agri-food sector strategy include:

- York Region policy documents – *Official Plan, 2010; Vision 2051*
- Prime agricultural areas and specialty crop lands
- World crop (vegetable production) opportunities
- Lake Simcoe Watershed - *Lake Simcoe Protection Act, 2008* and *Lake Simcoe Protection Plan*
- Economic Development Action Plan, 2016-2019

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[31] York Region Planning and Development Services, (2009). *York Region 2031 Land Budget.*
[32] Ibid.
[33] The Regional Municipality of York, (2011). *Vision 2051.*
[34] Ibid.

- York Farm Fresh Study, 2016
- Golden Horseshoe Food and Farming Alliance – Asset Mapping, 2015
- York Region Food Charter, 2013

These relevant documents, strategies and assets are discussed further below.

3.2.1 York Region Policy and Strategy Context

Approximately 69 per cent of York Region is within the Greenbelt Plan Area, a significant portion of which is protected for agricultural use. Appendix A includes a map of York Region that shows the Greenbelt and Oak Ridges Moraine boundaries. Chapter six of the *York Region Official Plan, 2010* is dedicated to agriculture and recognizes it as an important part of the Region's geography, economy and community fabric. *Vision 2051* also recognizes the role of agriculture on the landscape and in York Region's heritage and economy. A vision for a thriving agricultural community includes[35]:

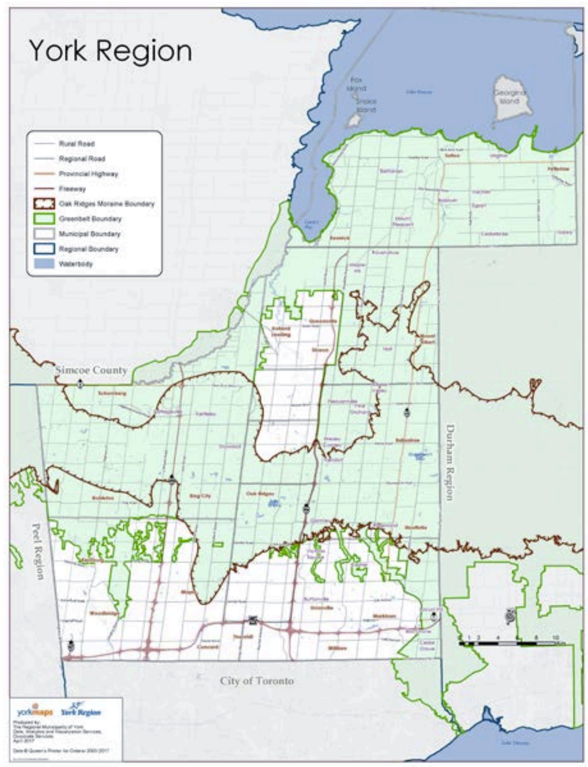

Figure 9: York Region Map. For a more detailed version, please see Appendix A

- Ensuring high-quality agricultural land is available for growing and producing local food that is accessible to residents and communities, and other agricultural products
- Facilitating a secure and safe food supply by encouraging local food production, farmers markets, field-to-table initiatives and a 100 mile diet
- Recognizing the value of the agricultural landscape for its economic productivity, contribution to sustaining natural habitat and corridors, such as carbon sinks
- Encouraging value-added food production, food manufacturing and processing

In alignment with the Greenbelt Plan, York Region's Official Plan "protect[s] Agricultural and Holland Marsh Specialty Crop Areas for the future to ensure a sustainable agricultural industry" and "support[s] York Region's farmers and agricultural organization as valuable contributors to the community."[36] The Holland Marsh is a highly productive specialty crop area for the province and stands out as a key agricultural asset for the Region.

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[35] The Regional Municipality of York, (2011). *Vision 2051.*
[36] The Regional Municipality of York, (2010). *York Region Official Plan, 2010.*

3.2.2 An Economic Driver in York Region: Prime Agricultural Lands and Specialty Crop Areas

A crucial element that drives prosperity across the agri-food sector is access to prime agricultural lands. York Region has highly favourable soil conditions for agriculture which results in a broad range of production opportunities for the sector. Corn, soybeans and wheat are the largest field crops produced in York Region, covering over 64,000 acres of production. Perennial forage crops such as alfalfa and tame hay support York Region's livestock production, including beef cattle, dairy cattle, poultry and egg production as well as sheep. In some parts of the Region (e.g. King Township), several horse and equine farms can be found. Additional detail on agricultural production can be found in section 5 and Appendix E of this report. Through *York Region's Official Plan, 2010,* prime agricultural land[37] and specialty crop lands have been designated as agriculture policy areas and Holland Marsh area, respectively. Field crop and livestock production are supported by prime agricultural lands across the Region.

> ***Prime Agricultural Areas*** *include specialty crop areas and areas where prime agricultural land (Canada Land Inventory Classes 1 – 3) predominate.*

> ***There are 183 003 acres (74,058 hectares) designated as agriculture policy area in York Region. The agricultural policy area represents the prime agricultural land in York Region.***
>
> ***There are 12,337 acres (4992 hectares) designated as specialty crop lands in York Region.***

Greater than half of the Holland Marsh is located within York Region. As the largest area of organic (muck) soil developed for agriculture in the province, the Holland Marsh is one of the most intensive areas of agricultural production in the country. Approximately 7,000 acres within the Township of King, 3,500 acres within the Town of East Gwillimbury, and 900 acres within the Town of Georgina are under agricultural operations or are designated as natural heritage areas. The Holland Marsh is one of two specialty crop areas within the province.[38] It's rich, muck soil is suited for carrot and onion production, and provides substantially higher crop yields than highland soil for these two crops. The Holland Marsh is a significant driver of agricultural production in York Region.

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[37] OMAFRA, (2016). *Prime Agricultural Areas.*

[38] The other provincially significant specialty crop area is the Niagara Peninsula Tender Fruit and Grape Lands

Not only does the Holland Marsh provide income in the form of agricultural outputs, but it provides substantial economic impact through labour income and value added operations. It was estimated that the full Holland Marsh area's primary production contributed $35-$58 million to Gross Domestic Product in 2009.[39] Further, when considering the entire value chain, between $95 and $169 million dollars of economic activity were generated.

Specialty Crop Areas are areas designated using guidelines developed by the Province. Protection results from:

- *Soils that have suitability to produce specialty crops, or lands that are subject to special climatic conditions*
- *Farmers skilled in the production of specialty crops*
- *A long-term investment of capital in areas such as crops, drainage, infrastructure and related facilities and services to produce, store, or process specialty crops*

Additionally, the Holland Marsh is the site of continued advancement in the agricultural sector, particularly in vegetable production. A University of Guelph Research Station is located within the Holland Marsh and is situated near the intersection of Highway 400 and Highway 9. They do extensive research (variety trials, pesticide trials, nutrient management, etc.) on carrots and onions and a vast array of other vegetables, making significant contributions to the agri-food sector. This research station provides continued advancement in vegetable production through their innovative research and yearly publications.

3.2.3 World Crops in York Region

As Ontario becomes an increasingly diverse cultural and ethnic environment, demand grows for more locally sourced ethnic foods, particularly vegetables. The Niagara Region has already started to grow some of these vegetables with the help of the Vineland Research and Innovation Centre. Main vegetables that are grown in the area are okra and Chinese/Indian eggplant. Other vegetables gaining momentum due to consumer demand are Indian red carrots, Chinese green onion, sweet potatoes, and Asian yard long beans.

The Vineland Research and Innovation Centre predicts that by 2020, there will be 2.2 million new Canadians – two-thirds of which will be South Asians, Chinese, and Filipinos – demanding ethnic vegetables. From 2008 to 2012, Canadian consumption of eggplant increased by 27 per cent and 55 per cent for okra. It is also estimated that local production only meets approximately 10 per cent of the in-season demand, so this indicates that demand is greater than supply, and that much can be gained from growing these world crops locally. World crop vegetable production could be an opportunity for York Region, as much of the climate is already well-suited for vegetable production, and vegetables are high-value crops that could be beneficial for economic development in the Region's agri-food sector. This was highlighted by stakeholders as a key opportunity to explore.

3.2.4 Lake Simcoe Watershed

[39] For a full description on the economic impact of the Holland Marsh, see the study carried out by Planscape in 2009.

The Lake Simcoe Protection Act, 2008 and *Lake Simcoe Protection Plan* are other relevant Provincial plans that impact York Region's agri-food sector. The Lake Simcoe watershed contains some of the most productive agricultural lands in Ontario. Extreme weather events, such as floods and droughts have the potential to significantly impact primary producers.[40] The *Lake Simcoe Climate Change Adaptation Strategy* takes a multi-faceted approach to drive actions in the Lake Simcoe watershed to adapt to a changing climate. Actions to address climate change and its impacts are being implemented throughout the watershed.

For example:

- Agricultural water use assessments in the Holland Marsh are helping farm operations assess their water use to implement water conservation actions to prepare for potential climate change impacts such as an increase in flooding and/or drought events.[41]
- The Ministry of Environment and Climate Change (MOECC), in collaboration with Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) and the Holland Marsh Growers Association have collaborated to ensure waste water (from vegetable processing) is treated and discharged according to the requirements under the *Ontario Water Resources Act, 1990.*[42]

3.2.5 Agri-Food Economic Development in York Region

The *Economic Development Action Plan, 2016-2019* highlights York Region's role in the Greater Toronto Area (GTA) and Ontario economy. Home to nearly 1.2 million residents and over 49, 000 businesses, the Region is positioned for continued growth and investment. One area of the action plan that is particularly important for supporting the agri-food sector is its commitment to a Broadband Strategy.

York Region began its objective to improve broadband with their 2014 broadband strategy. Improved broadband means an increased connectivity throughout the Region, therefore positioning York to be more competitive. The strategy is based on three priorities:

1. Education and Advocacy;
2. Municipal Process;
3. Infrastructure Investment

An update of this strategy from 2016 reported that the Region is driving significant improvements.[43] Connectivity has advanced under each priority area through intelligent community initiatives such as the launch of the Region Broadband Strategy Advisory Task Force, the development of a broadband planning policy language tool, and the launch of a public Wi-Fi pilot project. York Region has also led a delegation to Parliament Hill to promote

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[40] Government of Ontario, (2009). *Lake Simcoe Protection Plan.*
[41] Ministry of Environment and Climate Change, (2017). *Lake Simcoe Climate Change Adaptation Strategy.*
[42] Ministry of Environment and Climate Change, (2015). *Minster's Five year Report on Lake Simcoe.*
[43] The Regional Municipality of York, (2016). *York Region Broadband Strategy Annual Update*

infrastructure priorities and to seek federal funding. Overall, the Region is moving toward their goal to build a knowledge economy, and drive growth in residential population and the business community.

Acknowledging the link between high speed connectivity and economic growth indicates a strong commitment to enabling rural businesses, such as agriculture and food businesses, to expand and succeed.[44]

3.2.6 York Farm Fresh Organization

At the time of writing this report, a discussion around the future of the York Farm Fresh organization is ongoing as key stakeholders consider what this organization may look like and how it will operate. However, the recent *York Farm Fresh Marking Recommendations* report provides relevant insights into direct farm marketing in the Region.[45] With growing consumer and policy interest in local food, a study conducted in 2016 indicates there is strong demand for a joint marketing initiative that would connect York Region residents with local products. Social media and directional signage were suggested as necessary to help consumers find local producers. The Farm Fresh Map and Pumpkin Pie Trail map are additional economic development tools that promote York Region's diverse agricultural production.

Leading by Example

Hillside Gardens Ltd.

Located on the Holland Marsh near Bradford (Simcoe County), Hillside Gardens grows carrots, onions, turnips, beets, and parsnips. In 2009, they received the Minister's Award for Agri-Food Innovation Excellence for their traceability system. This system traces information on produce from the seed stage to its final retail destination using software called ProducePak™. This means tracking all production inputs, including the fertilizer used and pest management techniques.

"We have improved our inventory control because we now have real time data on what's happening in the field with our PDAs. This helps reduce spoilage and waste."
– Ron Gleason, CEO and General Manager, Hillside Gardens Ltd.

[44] The Regional Municipality of York, (2016). *Economic Development Action Plan, 2016-2019.*
[45] Werry CO. (2016). *York Farm Fresh Marketing Recommendations.*

3.2.7 Golden Horseshoe Food and Farming Alliance – Asset Mapping, 2015

A 2015 report from the Golden Horseshoe Food and Farming Alliance – *Analysis of Food and Farming Assets in the Golden Horseshoe* – provides a higher level analysis of food and agricultural assets across the Golden Horseshoe (GH) Region. A whole value chain approach was used to analyze the agri-food sector in terms of production, processing, distribution and access (retail, food service and exports).

This 2015 study revealed several key analysis trends, including:

- The farming sector lost more jobs than expected; key challenges are related to urban growth and increasing rural residencies[46]
- Meat manufacturing, the second largest sub-sector in the GH region, has improved its relative performance (compared to 2013) but is still underperforming compared to the rest of the province. Several of the core meat processing assets located in the GTA are facing pressure from residential growth and rising energy costs[47]
- Fruit and vegetable processing shows a significant decline due to processing plant closures in the GH region; high cost of production (energy costs, labour and regulations) were identified as challenges for these operations[48]
- Beverage manufacturing appears to be thriving in the GH region; increases in the number of wineries and micro-breweries have been a strong contributor to this growth[49]

The *Analysis of Food and Farming Assets in the Golden Horseshoe* report recommends:

1. Increases in processing capacity through business retention and investment attraction;
2. Increase average production value per acre with high value crops; and
3. Further develop on-farm value added and farm direct sales by creating demand for local food.[50]

A summary of this report has been included in Appendix B of this report. York Region actively participated in the Asset Mapping exercise, and continues to collaborate with the Golden Horseshoe Food and Farming Alliance on a project basis.

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[46] Synthesis Agri-Food Network, (2015). *Analysis of Food and Farming Assets in the Golden Horseshoe*
[47] Ibid.
[48] Ibid.
[49] Ibid.
[50] Ibid.

3.2.8 Food, Farming and Health

The *York Region Food Charter* promotes a system, from “farm to plate”, that provides access to local, affordable and nutritious food for all.[51] Based on five interconnected pillars, the Charter is a guiding document for the development of coordinated food-related policies and programs in York Region. The *York Region Food Charter Toolkit* provides residents with a range of ideas to implement at the household level that will help build a healthy food system for all. This toolkit compliments the Charter by offering ideas and insights to help incorporate healthy and high quality food into one’s daily life.[52]

The Food Charter Working Group is made up of representatives from the following organizations:

- York Region Food Network
- Heart and Stroke Foundation
- United Way York Region, in partnership with York University
- Seeds for Change
- York Federation of Agriculture
- City of Markham, Sustainability Office
- York Region Community Health Services and Healthyork

Identifying ways to support local and healthy food production is an important part of the agriculture and agri-food strategy

Leading by Example

King Cole Ducks Limited

King Cole Ducks, a family owned and operated duck farm, is located in Newmarket with farms across York Region. Recognized as the only fully vertically integrated farm of its kind in North America, King Cole Ducks maintains complete control over every phase of their production process including: research and development; breeding, hatching and growing to final production; and product development and further processing. In addition to being the largest duck farm in Canada and only one that is 100% Canadian owned, King Cole Ducks is also the first to achieve SQF (Safe Quality Food) Accreditation as part of the Global Food Safety Initiative.

King Cole Ducks provides culinary education opportunities at their retail store, and celebrate local chefs and cuisine through their King Cole Chef Showcase. They are also an active partner in the Buy Fresh, Buy Local initiative through Foodland Ontario.

[51] York Region Food Charter, (2013).
[52] York Region Food Charter Toolkit, (2016).

4.0 Stakeholder Consultation Results

4.1 Consultation Methodology

To ensure buy-in from York Region's agri-food sector, a *collaborative public participation approach* was applied for the stakeholder consultation phase of this project. As defined by the International Association for Public Participation, a collaborative approach ensures that "we look to the public for advice and innovation in formulating solutions" and will develop a strategy that includes the input provided by stakeholders.[53] This approach will support buy-in when it comes to implementing the strategy.

The stakeholder consultation phase of the project consisted of three primary data collection methods:

1. A questionnaire that was delivered via an online survey tool
2. Key informant interviews
3. Two public open house sessions

In total, there were 140 responses to the survey, 36 attendees at the open house sessions, and 15 interviews with key informants. Please see Appendix C for copies of the questionnaire and interview guide.

The results of the stakeholder engagement phase of the project are used to inform the final recommendations of the agriculture and agri-food strategy. This process not only supports buy-in, but also helps to ensure that the final strategy truly reflects the unique characteristics of York Region.

The key findings from the stakeholder consultation phase are outlined below (please see Appendix D for more detailed results and raw data).

4.2 Survey Results

Of the 140 responses that were collected for the online survey, the figure below describes which aspect of the agri-food value chain the respondents represent. Please note, respondents could select more than one answer (E.g. a respondent could be a producer and consumer/resident of York Region). Thus the percentages from figure 10 do not add up to 100%.

[53] International Association for Public Participation, (2016). *IAP2 Spectrum.*

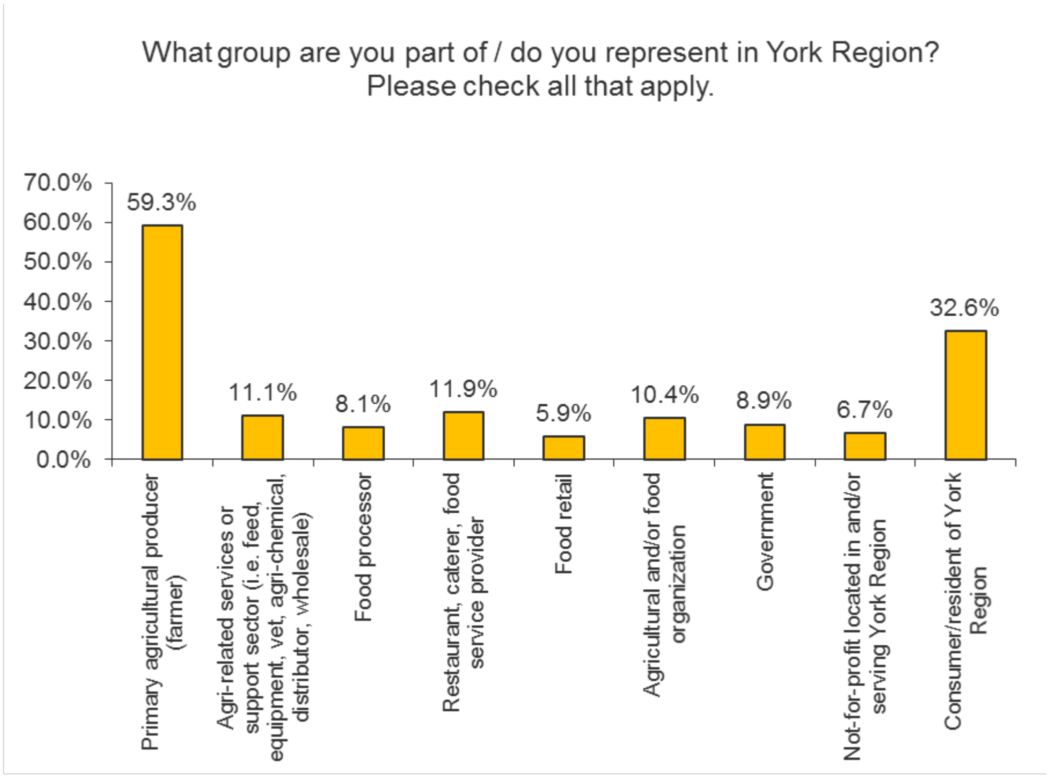

Figure 10: Representation of survey respondents across the agri-food value chain (Question 1)

In terms of where survey respondents were from, the Municipalities with the largest representation in the survey were:

- Town of Georgina (23 per cent)
- Town of East Gwillimbury (17 per cent)
- Town of Whitchurch-Stouffville (16 per cent)
- Township of King (12 per cent)

This is reflective of the lower-tier municipalities with more active agricultural sectors (more rural municipalities).

"York Region has a lot of existing infrastructure to recognize and support the agriculture and food sectors, including municipal and regional agricultural committees." (Survey Respondent)

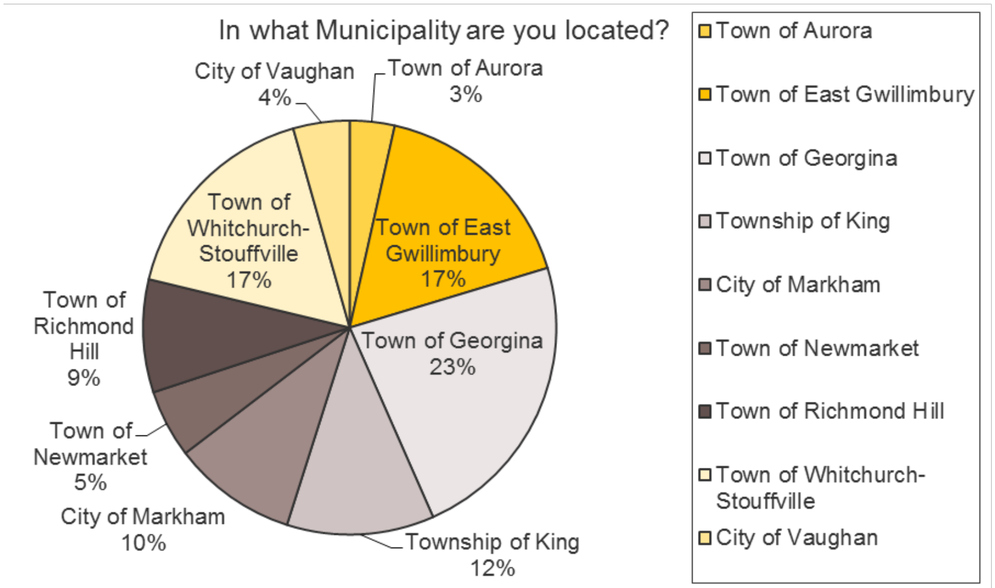

Figure 11: Representation of survey respondents across York Region (Question 3)

Survey respondents were asked to rank a list of trends and issues based on how much they either ***support or limit*** York Region's agri-food sector. The following charts (figure 12 and 13) illustrate the ranking of these responses.

In terms of trends and forces that *support* York Region's agriculture and agri-food sector, the top three trends were:

- Access to a large, urban market
- Unique and high quality agricultural land
- Consumer interest in local food and niche/specialty markets.

"Our access to the GTA market and the growing awareness of the 'buy local' movement as well as a diverse population is key to our pick-your-own vegetable business success."
(Survey Respondent)

Broadband internet access and policies that protect agricultural land were also highly ranked as trends that support the agri-food sector.

"Location, location, location – which also makes us the closest contact with many non-agricultural people in terms of education and understanding the importance of primary food production."
(Survey Respondent)

"We have quality soils and a great climate for growing food close to an urban area that has strong food processing infrastructure."
(Survey Respondent)

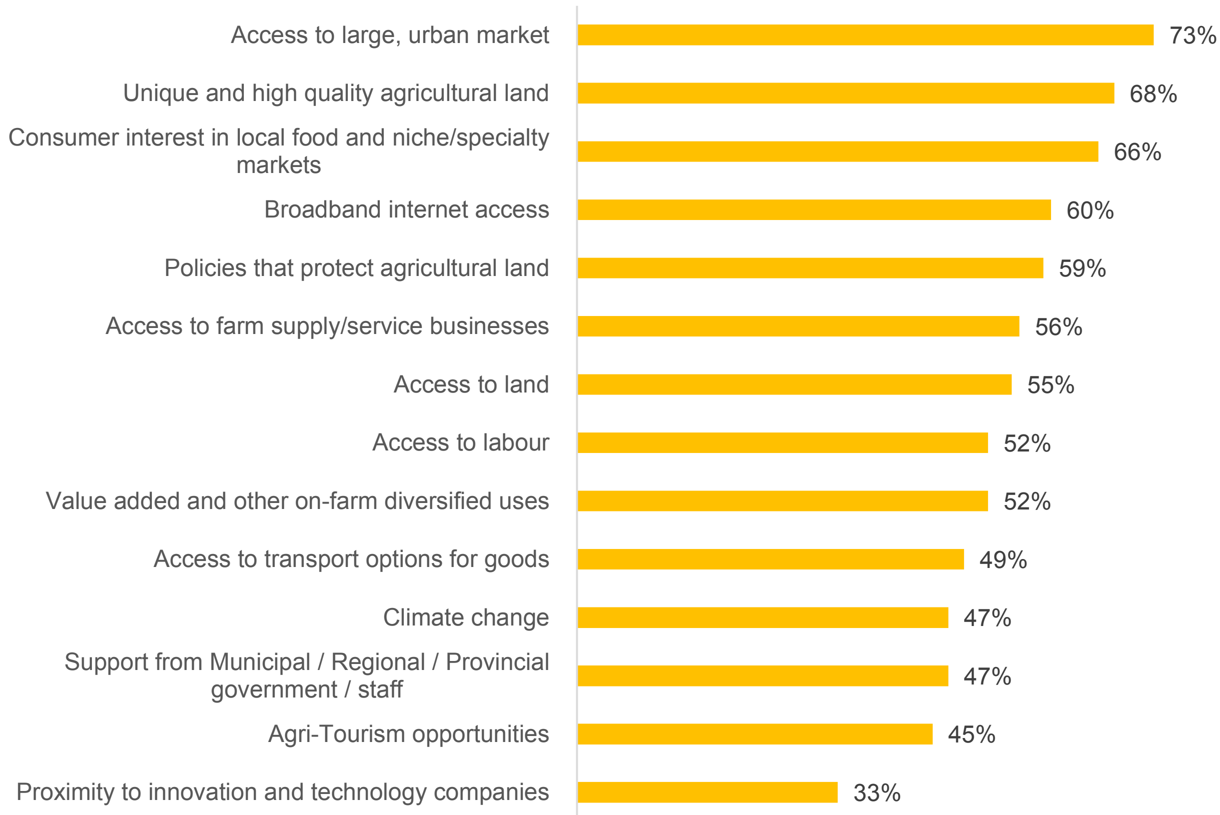

Figure 12: Trends that support York Region's agri-food sector (Question 6)

The top three trends that *limit* York Region's agriculture and food sector are:

- Urbanization
- High cost of inputs for operation
- Lack of government support (local, regional, provincial and federal).

"Lack of land ownership and short-term land leases restrict investment that can be made in land management to enter different markets such as organic production." (Survey Respondent)

These trends (i.e. urbanization and high cost of inputs) are not isolated to York Region and impact agricultural and food producers across Ontario and Canada. However, it is worth noting that these trends do impact agricultural producers and create new challenges that force producers/processors to adapt.

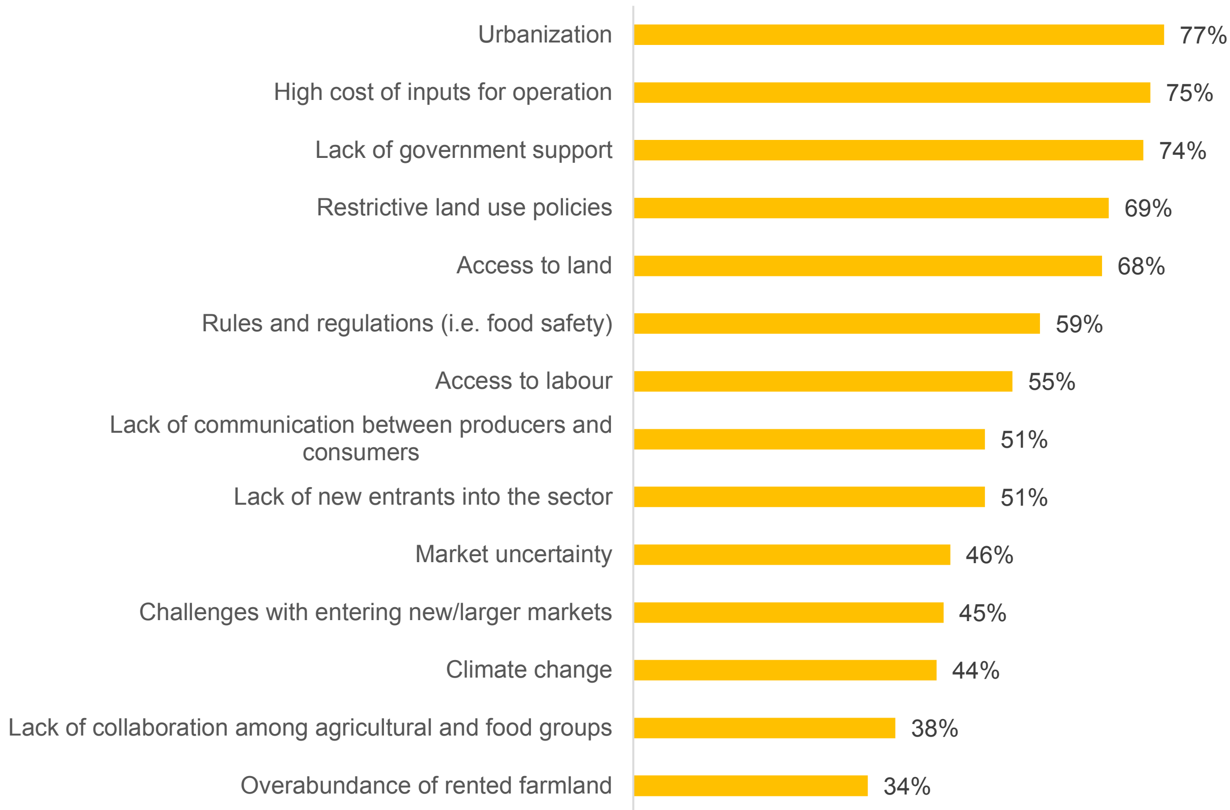

Figure 13: Trends that limit York Region's agri-food sector (Question 7)

Survey respondents were asked to provide input on the outlook for economic growth for York Region in the following categories:

- Overall agriculture and agri-food sector
- Primary production segment
- Food processing segment
- Restaurant / retail / food service provider segment

> *"So far, I haven't had a good/beneficial experience pertaining to my business being established in York Region…we are a food manufacturer and it seems that York does not want this type of business here" (Survey Respondent)*

The two categories positioned for moderate to significant decline include overall agriculture and agri-food sector and the primary production segment. The food processing segment appears more stable, while the restaurant/retail/food service provider segment is positioned for moderate to significant growth.

The following graph illustrates respondent's perspectives on economic growth in York Region:

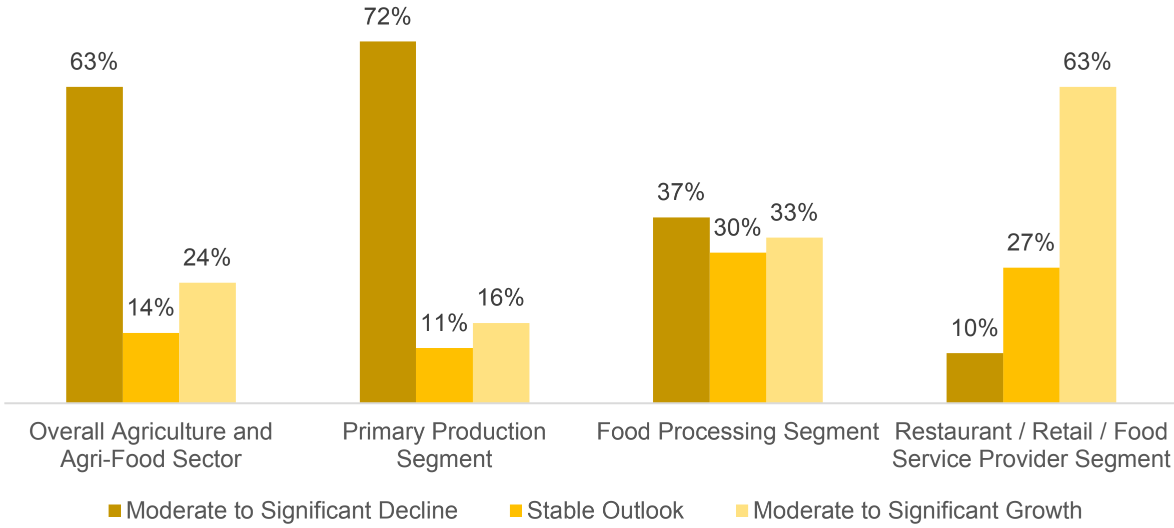

Figure 14: Economic Outlook for York Region (Compiled from question 8-11)[54]

> *"It is challenging to farm in York Region when so much agricultural land is owned by developers. This creates disinterest in investing in that parcel of land as it will be developed – just a matter of when." (Survey Respondent)*

Stakeholders were asked to consider potential opportunities to grow the agri-food sector in York Region. The graph below illustrates some opportunities and their potential impact to the sector.

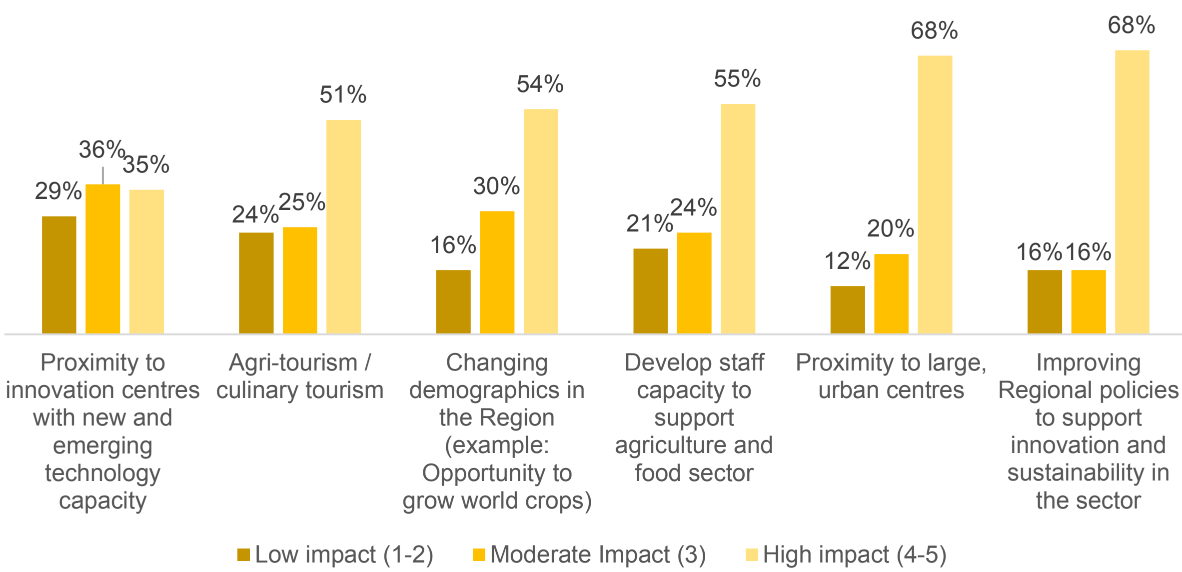

Figure 15: Potential opportunities for York Region's agri-food sector (Question 12)

[54] Please note, percentages have been rounded to the nearest whole number, and therefore may not add up to 100%.

Respondents indicated key opportunities for York Region include:

- Improving Regional policies to support innovation and sustainability in the sector
- Leveraging the Region's proximity to several large, urban centres
- Developing staff capacity to support agriculture and food sector
- The changing demographics in the Region
- Agri-tourism / culinary tourism

These opportunities will be taken into consideration in the development of the strategic priorities for this action plan (See section 7.0).

4.3 Open House Sessions Summary

Two Open House sessions were held at the East Gwillimbury Sports Complex in Sharon on March 27th, 2017. These Open Houses provided an opportunity to share some high-level findings from the survey and interviews to date. Between both sessions, approximately 36 attended with a mix of primary producers, processors, business owners, and municipal and Regional staff. A 'World Café' facilitation style was used in which five tables were assigned a different question. Post-it notes, flipchart paper and markers were provided to record ideas.

The questions that were posed to Open House attendees along with some of the key ideas generated are listed in Table 3 below (additional details can be found in [Appendix D](#)).

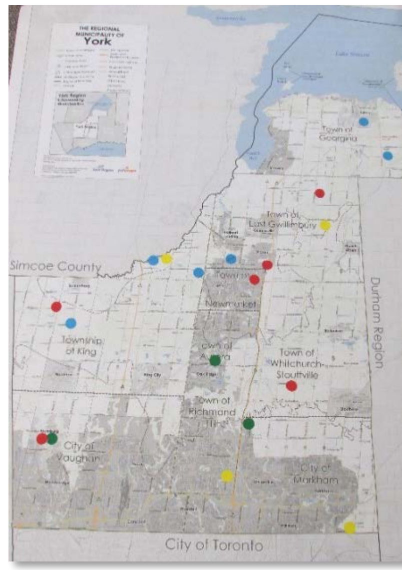

Figure 16: Participatory mapping was used to identify where participants were coming from.

Figure 17: Images from March 27th Open House, held in Sharon at the East Gwillimbury Sports Complex

Table 3: Open House Summary (please note that these suggestions are derived directly from the discussion and are not necessarily reflected in the strategic goals and action items)

Conversation Starter	*Key Ideas*
1. Local Customer = Local Potential? *We are close to a large and demographically diverse urban centre…how can we take advantage of this?*	• Develop and support food incubators (or hubs); e.g. The Link in Georgina • Develop an annual form/networking event to act as learning and sharing opportunity • Encourage producers to diversify (niche production, specialty crops, world crops, etc.) • Explore innovative financial mechanisms to incentivize local production • Consider branding exercise (e.g. Grown in York)
2. Food Companies + Farm Businesses = Opportunities for Innovative Partnerships? *York Region is home to many farms and food companies…is there any way to work together more effectively?*	• Support and develop innovative partnerships with retailers • Develop (or find an existing program) that connects GTA chefs with producers • Partner and develop initiative that sells 'ugly' vegetables/fruits (Sell for less; support food security initiatives) • Support relationship building with food distribution companies • Develop mentorship program (e.g. new entrants can connect with established producers

3. Big Ideas + Technology = New Opportunities?
New technology is changing our world. What technology and innovations would take agriculture and food in York Region to the next level?
	• Before we can take advantage of this, we need a strong internet connection (in North part of the region specifically)
	• This could improve crop production practices and traceability (precision agriculture, GPS technology, etc.)
	• Develop a directory of agri-food technology
	    ○ Categorize by sectors/commodities
	    ○ Test new agri-food technology in the Region
	• Partner with universities to test new technologies in agriculture (e.g. University of Guelph; Muck Crops Research Station)
	• Controlled environment agriculture (can control climate, and reuse waste)

4. Simple Changes = Make things work for everyone
Are there any 'simple changes' that could make agriculture and food in York Region better?
	• Develop a land speculation tax that would increase rate for foreign buyers and discourage short-term land rental agreements
	• Agricultural buildings should be exempt from 'major development' in Oak Ridges Moraine Act
	• Develop an online tool: Farm Directory for York Region
	    ○ List of farms
	    ○ Map of farms
	    ○ What farms are selling direct or where you can purchase products
	    ○ 'Dating service' that connects producers with processors with retailers, etc.

	• Increase communication between the Region and the sector • Develop consistent marketing for the sector through Farm Fresh organization ○ Release the Farm Fresh map in additional languages • Showcase agricultural businesses (newsletters, TV, social media, etc.) • Support farmer/chef networking sessions • Develop local food procurement policies for York Region • Leverage ongoing regional, provincial and federal initiatives

5. Collaboration + Leadership = Success
There are multiple groups, organizations and companies working in agriculture and food in York Region…how can we leverage this collective energy and who should take on the leadership role? And what does this leadership role look like?
	• Although there are a lot of groups and organizations in the Region, the one suggestion that was repeated several times was that there should be a dedicated staff role to provide the key point of contact for agriculture and agri-food in York Region. This person could have the following responsibilities:
	  ○ Plan events and forums to gather input from whole value chain (production through to retail)
	  ○ Resources for new entrants / start-ups
	  ○ Connect people with small business enterprises (training opportunities)
	  ○ Develop and maintain a directory
	  ○ Facilitate relationship building across the sector

Figure 18: York Region Sector Strategy Open House, March 27th

4.4 Interview Results

As part of the stakeholder consultation phase, 15 interviews were conducted with key informants within the Region. The first group of individuals were identified in collaboration with the York Region Agricultural Advisory Liaison Group and subsequently through a snowball sampling method.[55]

The following SCOT Analysis (**S**trengths, **C**hallenges, **O**pportunities and **T**hreats) is based on primary research from interviews conducted by the project team. In addition to the survey results and open house findings, the SCOT analysis informs the final recommendations and strategy.

Table 3: Strengths for the sector based on results of interviews

STRENGTHS
Proximity to Markets - Proximity to retail hubs and food processors - Proximity to consumer base (GTA and international markets) - Multicultural population creates demand for unique products - A growing population = higher demand for our products **Great Place to do Business** - Good infrastructure to move goods and products (e.g. major transit routes) - Strong food processing in urban areas - Recognition for safe food production practices - Warehousing is strong (in Vaughan) - Several conveniently located grain storage elevators - Students to hire on in summers - Strong agri-business sector (many employment opportunities) - Great farm equipment dealers - Network of farmgate businesses - Strong network of Farmers' Markets and local markets (e.g. Vince's) - Favourable farm tax rate **A Unique Environment for Food Production** - Greenbelt policies protect farmland - High quality land for crop production (e.g. Holland Marsh) - Access to clean and abundant water supply - Favourable climate - Relatively specialized producers for international / regional market in cash crops, dairy, sod and more

[55] A snowball sampling method is a nonprobability sampling technique where "existing study subjects recruit additional subjects through their own networks." YRAALG members provided the project team with a significant number of interview and open house contacts.

Strong agricultural heritage - Innovative producers (able to adapt to changing markets) with expertise - Strong producer groups that move the sector forward (e.g. Holland Marsh Growers Association) - Municipal and regional agricultural advisory committees - Spirit of collaboration and ability to organize effectively - Have continued to persevere in the face of aggressive development, urban residential growth (and the conflicts that arise at rural-urban fringe) Existing Infrastructure for Agri-Tourism - Local agricultural fairs are strong and attract thousands - Headwaters Horse Country – Community tourism Plan (cross-region initiative)

Table 4: Weaknesses of the sector based on interview results

CHALLENGES
Urbanization - Cost of land has increased; non-farmers are purchasing agricultural lands - Expensive housing (difficult for labour to find housing) - Farmland preservation does not feel like priority for the Region - Too much pressure from developers - Limited livestock sector in the region (drive over an hour to process poultry, and have to book one month in advance) - Lack of access in northern part of the region to abattoirs (pork in particular) **Challenging Regulatory Environment** - Strict environmental regulations (e.g. waste water for processors); short time to adapt - Provincial policies limit ability for agricultural operations to expand, add value and innovate **Lack of Profile for Agriculture** - Lack of profile for agriculture in the Region (compared to other sectors) - Lack of staff support at the Regional level - Lack of understanding / expertise with planning and economic development staff (municipal and Regional level) - Lack of coordination in agricultural organizations **Connectivity Issues** - Internet challenges in northern part of Region **Poor Consultation with Agricultural Sector** - Lack of consultation from the region: e.g. bridge repairs - little consultation, which negatively impacted farm operations (closed roads, no notification of when) - Producers not considered in decision making

Table 5: Opportunities for the sector based on interview results

OPPORTUNITIES
Growing Demand for Local Food and Specialty Products - Significant opportunity for Farm Fresh initiatives (to buy direct) - Improve organization of farmgate business opportunities (e.g. through Farm Fresh) - Demand for specialty crops and world crops in GTA **Agri-Tourism** - Farm Fresh Map and Pumpkin Pie Trail demonstrate agri-tourism opportunities - Several successful fall fairs around the Region to further promote agri-tourism - 'Entertainment farms' have done well in York Region (E.g. Whittamore Farms) **Educational Opportunities** - Educational opportunities for consumers ('meet your local producer' events) **Technology and Innovation** - Opportunities to improve farming practices with new technology (drones, precision ag) - Urban agriculture, vertical farming, etc. provide opportunities for food production in non-conventional areas - Increase collaboration with organizations like VentureLab **Food and Health** - Food procurement (e.g. local food for hospitals, schools, etc.) - Connection between farming and health - Reinvigorate the Food Charter across the Region - Food hubs or other innovative distribution centres/models (e.g. Elmira Auction model) **Rouge National Urban Park** - Rouge National Urban Park is a new and exciting opportunity (includes "thriving agricultural sector" in their mandate) **Unique Partnerships** - Joint marketing initiatives for local products - Develop relationships with other Regions for food distribution/food hub centre - Facilitate relationships with retailers that support local (e.g. Longos) - Government is interested in improving food sector **Other Opportunities** - Less competition for land (to rent) as number of farmers is declining - Millennial trends and health conscious eating options (buying gourmet ingredients to prepare a meal, rather than buying groceries for the week) - Help producers understand when an Agricultural Impact Assessment can be used (with new updated to four provincial plans)

Table 6: Threats to the sector based on interview results

THREATS
Continued Urbanization - Forecasted growth - Whitebelt urbanization - Lack of investment in land due to short term rental agreements (may lead to less sustainable practices) - Access to (affordable) labour - Specialty crop areas need more protection - Cost of housing will limit ability to access labour **Succession Challenges** - High costs (land, labour, etc.) in primary production discourage next generation from staying in the region **Regulatory Challenges** - Food processors looking outside of the region for future expansion **Other Threats** - Continued loss of great programs, such as FarmStart - Volatile trade deals that hurt the industry (e.g. dairy industry)

5.0 York Region – Agriculture and Agri-Food by the Numbers

The following section highlights key trends and changes to York Region's agri-food sector, based on the 2011 Census of Agriculture and the updated 2016 Census of Agriculture which was released on May 10th, 2017.[56] A comparative analysis has been completed to illustrate trends and opportunities for York Region's agri-food industry.

Key trends to take note of in this section include:

- The number of farms in York Region has dropped since 2001 and has decreased by 116 since 2011, yet size of farms are increasing (there are 15 more acres per farm on average in 2016 than in 2011)[57]
- Gross farm receipts per farm, which is a measure of farm business income, is rising in the Region
- York Region's farm cash receipts per acre is $1000 higher than provincial farm cash receipts per acre due to high value crop production (such as vegetables)
    - East Gwillimbury in particular has notably high farm cash receipts value per acre
- The average age of producers in York Region has increased from 56.9 in 2011 to 58 in 2016, which is reflective of overall trends across Canada
- Data on direct farm marketing was included for the first time in the 2016 Census; 20 per cent of farms in York Region reported direct-to-consumer sales using farm gate sales/kiosks/pick-your-own[58]
- In York Region, 52.7 per cent of the land is either rented, leased or crop shared (compared to 32.4 per cent in Ontario)

Overall, this section highlights the current and overall outlook for York Region's agricultural sector. Key trends have been noted in this section, with additional updated Census data included in Appendix E of this report (additional detail on crops/livestock produced in York Region). To note particular trends within the Region, comparisons and rankings across York Region's nine lower tier municipalities have been included, as well as comparisons to the wider region.[59]

5.1 Key Trends in 2016 Census of Agriculture

The following table provides an overview of the Census of Agriculture data in York Region, with comparisons between both 2011 and 2016 Census data. Detail on the Census data is provided in the text following this table. The total number of farms and number of farm operators are declining, although the number of corporate-owned farms are increasing. This correlates with

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[56] Data for this section is based on CANSIM tables 004-0200 to 004-0239.
[57] At the time this study was undertaken, there was limited data in the Census on farm size. Thus the average farm size has been calculated based on the total number of acres and farms.
[58] OMAFRA, (2017). *Overview of Direct Farm Marketing in Ontario, 2016 Census of Agriculture.*
[59] Please note that in the 2016 Census of Agriculture, Aurora and Richmond Hill were added to the Newmarket Census Consolidated Subdivision. In 2011, the three lower-tier municipalities were separated.

the trend that total number of farms are declining, yet farm size is increasing with farm consolidation. Other notable figures shown are the breakdown of land tenure by number of farms and acres. Most farms in York Region are owned by sole-proprietors, but family corporations also make up a large proportion (approximately 29 per cent), which has increased 8 per cent since the last Census round (2011).

Table 7: York Region Overall Farm Data (2011 vs. 2016 Census of Agriculture)

2011	2016	Change from 2011 to 2016
828 total # of farms ↓ **192** over the previous **10 years**	**712** total # of farms ↓ **308** over the previous **15 years**	↓ **116** from 2011 to 2016
1,215 total # of farm operators ↓ **225** over the previous **10 years**	**1,025** total # of farm operators ↓ **415** over the previous **15 years**	↓ **190** from 2011 to 2016
Average age of a farm operator = **57**	Average age of a farm operator = **58**	↑ **1** year from 2011 to 2016
617 # of sole proprietorships & partnerships ↓ **217** over the previous **10 years**	**461** # of sole proprietorships & partnerships ↓ **373** over the previous **15 years**	↓ **156** from 2011 to 2016
2011 ownership by percentages: • **53 per cent** of farms owned by sole proprietors • **21 per cent** of farms owned by a family corporation • **22 per cent** of farms operate in a partnership • **4 per cent** of farms owned by a non-family corporations	**2016 ownership by percentages:** • **47 per cent** of farms owned by sole proprietors • **29 per cent** of farms owned by a family corporation • **18 per cent** of farms operate in a partnership • **6 per cent** of farms owned by a non-family corporations	**Ownership changes from 2011 to 2016:** • ↓ **6 per cent** of farms owned by sole proprietors • ↑ **8 per cent** of farms owned by a family corporation • ↓ **4 per cent** of farms operate in a partnership • ↑ **2 per cent** of farms owned by a non-family corporations
73,151 acres total area of owned & operated farmland ↓ **1,985 acres** over the previous **10 years**	**67,293 acres** total area of owned & operated farmland ↓ **7,843 acres** over the previous **15 years**	↓ **5,858 acres** from 2011 to 2016
77,963 acres of land rented & operated* ↓ **89,419 acres** over the previous **10 years**	**67,835 acres** of land rented & operated* ↓ **21,584 acres** over the previous **15 years**	↓ **10,128 acres** from 2011-2016
6,582 acres of land leased from governments ↓ **9,332 acres** over the previous **10 years**	**6,209 acres** of land leased from governments ↓ **3,123 acres** over the previous **15 years**	↓ **373 acres** from 2011-2016

*More land area was operated by a renter than a landowner in York Region in 2011. In 2016, rented and owned acres were comparable in size.

5.1.1 Agricultural Production in York Region

York Region has a very diverse agriculture sector which includes a range of crops and livestock.

- Field crop production includes 106 farms covering over 64,000 acres of production
- Corn, soybean and wheat, which are annual crops, are the largest field crops produced in the region
- Perennial forage crops alfalfa and tame hay, which are used for livestock feed, also make up a significant amount of the crop area with over 21,000 acres.
- Livestock production includes 273 farms covering a wide range of types. Beef cattle farms make up the largest number with 83 farms. Other livestock production includes dairy cattle, poultry and egg and sheep. There are also 114 horse and other equine farms in York according to the Census data.
- As mentioned earlier in this report, vegetable and fruit production are also very diverse in York Region due to the high quality prime agricultural land and specialty crop area found in the Holland Marsh

5.1.2 Number and Size of Farms, 2016

Overall there is a long term decline in number of farms in the Region as shown in Figure 19, yet total farm acres is not declining as quickly (indicating that farm consolidation is occurring). In fact, the average size of farms is increasing. In 2001, the average size of a York Region farm was 172 acres. In the most recent 2016 Census, farm acreage data in York Region indicates that average farm size to be approximately 200 acres. That's a 16 per cent increase in average farm size in the last 15 years.

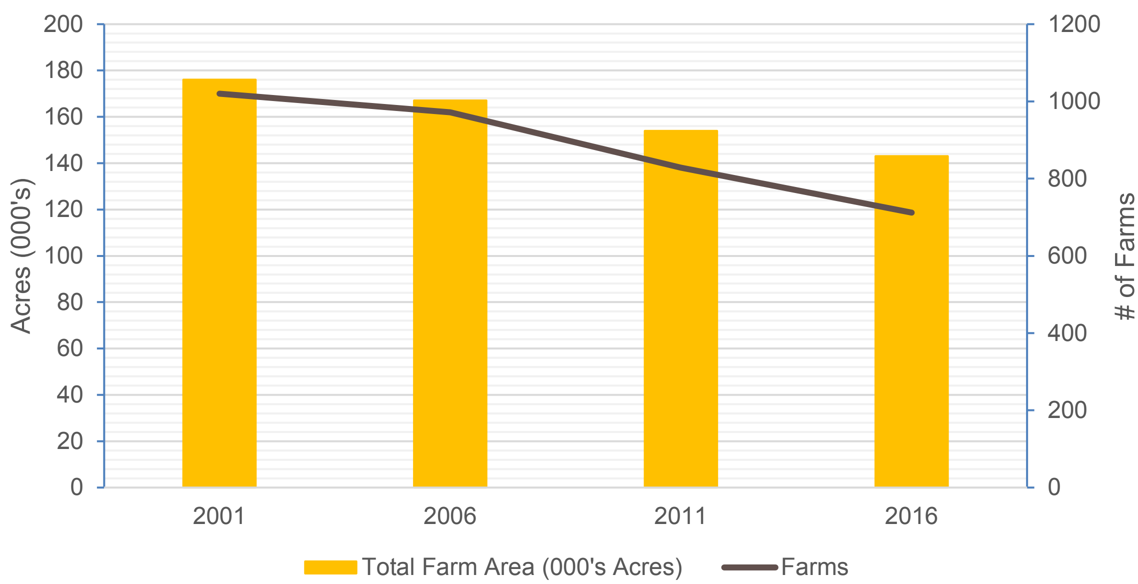

Figure 19: Number of Farms and Total Farm Area in the Regional Municipality of York, 2001-2016.

Looking in more detail, figure 20 shows that livestock farms have declined significantly in York Region since 2001. Grain farms and horticulture operations have stayed somewhat consistent since 2001. In figure 20, it is shown that livestock farms have declined by 181 farms from 2001 to 2016 and overall number of farms has decreased by 308 since 2001, meaning that more than half of the loss in farms have been from livestock operations. Therefore, the declining number of farms in York Region is highly attributable to the loss in the number of livestock operations over time.

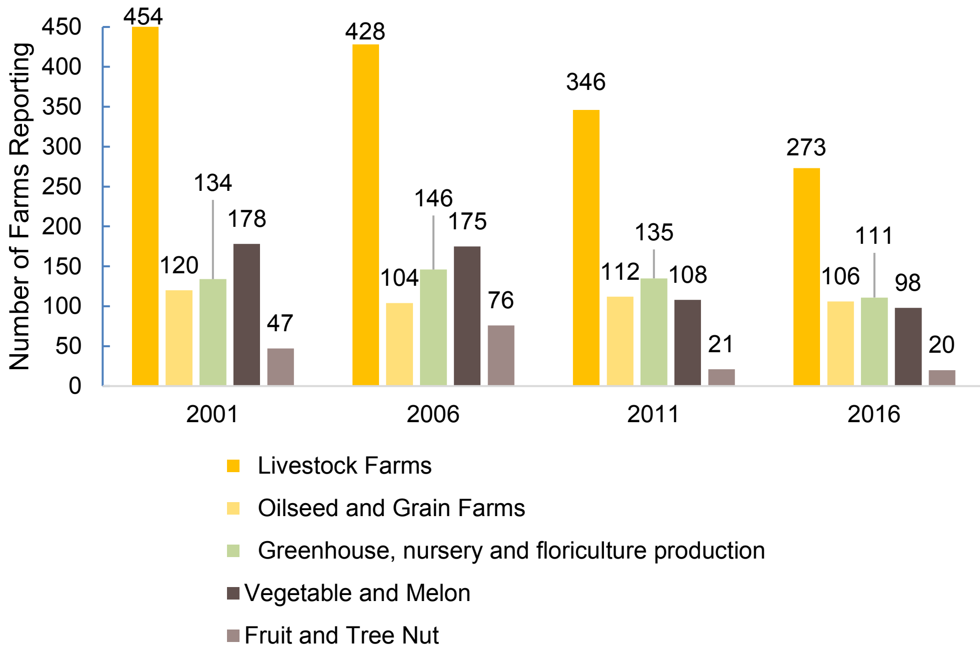

Figure 20: Number of Farms by Category (2001-2016)[60]

Figure 21 below demonstrates the overall trend of smaller acreage operations in York Region which is indicative of the high level of vegetable production as well as high land prices in the Region. 41 per cent of York's farms reported that their total farm area was between 10 to 69 acres. The next largest group (18 per cent of farms) reported farm area between 70 to 129 acres. This is similar to the provincial trend, although a higher proportion of farms identify in the 70 to 129 acre category in the province overall.

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[60] Farm area or gross farm sales by these categories is not given in the Census data. Keep in mind that displayed in this graph is simply the reported by number of farms, not how large each industry is.

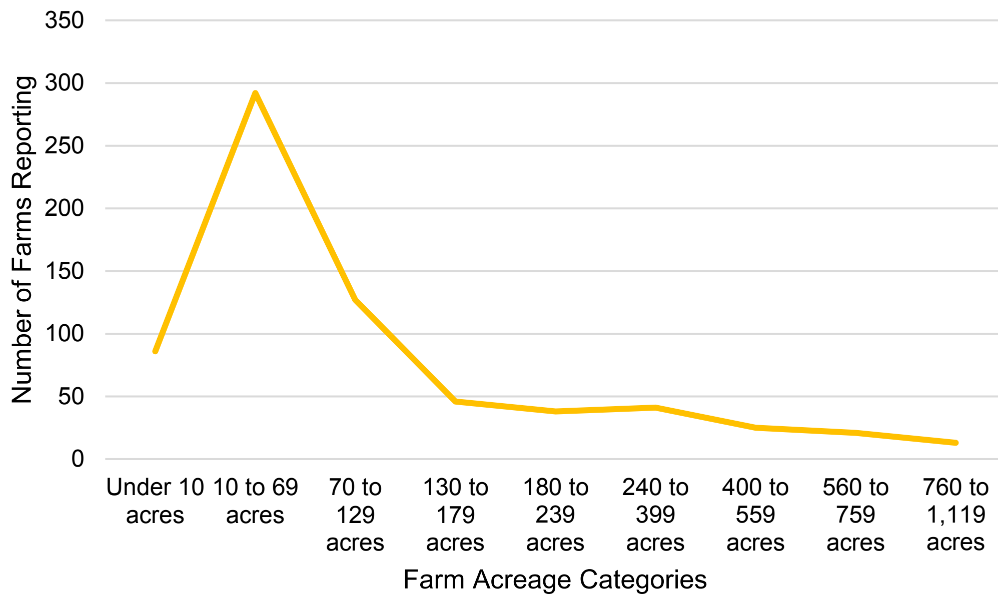

Figure 21: Farms reporting total farm area (2016)

York Region, like most municipalities in Ontario, is experiencing a decline in the number of farms (yet larger average farm size as indicated above), but is also experiencing increased total gross farm receipts. Table 8 shows the decline in the number of farms in the region comparatively to other surrounding regions. York has had the largest decline in the last 5 years compared to any other surrounding region. This decline is 14 per cent or 116 farms in the last five years.

Table 8: Number of Farms in Ontario, York, and Surrounding Regions, 2011-2016

Geography	2011	2016	% Change
Ontario	51950	49600	-4.5%
Peel	440	408	-7.3%
Dufferin	795	690	-13.2%
Wellington	2511	2348	-6.5%
Halton	469	451	-3.8%
Simcoe	2189	1974	-9.8%
Durham	1454	1323	-9.0%
York	828	712	-14.0%

Statistics Canada. Table 004-0201 - Census of Agriculture

Table 9 breaks down the number of farms in York by the lower-tier municipalities. All townships have experienced a decline except for King. Notable larger declines are Georgina and Vaughan: this is likely due to consolidation of farms in Georgina and urbanization in Vaughan.

Table 9: Number of Farms in York's Lower-Tier Municipalities, 2011-2016

Geography	2011	2016	% Change
Vaughan	78	56	-28.2%
Markham	55	53	-3.6%
Whitchurch-Stouffville	134	116	-13.4%
Newmarket/Aurora/Richmond Hill*	23	21	-8.7%
King	239	242	1.3%
East Gwillimbury	146	121	-17.1%
Georgina	153	103	-32.7%

*The Census Consolidated Subdivisions separated Newmarket, Aurora, and Richmond Hill in the 2011 Census data. In the 2016 Census of Agriculture, the "Newmarket" Census Consolidated Subdivision included all three towns.
Statistics Canada. Table 004-0201 - Census of Agriculture

Another way to illustrate trends related to number of farms and size and through analysis of cropland. Figure 22 expresses the breakdown of acres of cropland across lower-tier municipalities as a per cent of the total York Region cropland acres. King, East Gwillimbury, and Markham have the largest acreage in agricultural use.

Cropland is defined as land undergoing agricultural production excluding tame, seeded, and natural pasture lands, woodlands and wetlands, and Christmas tree area.

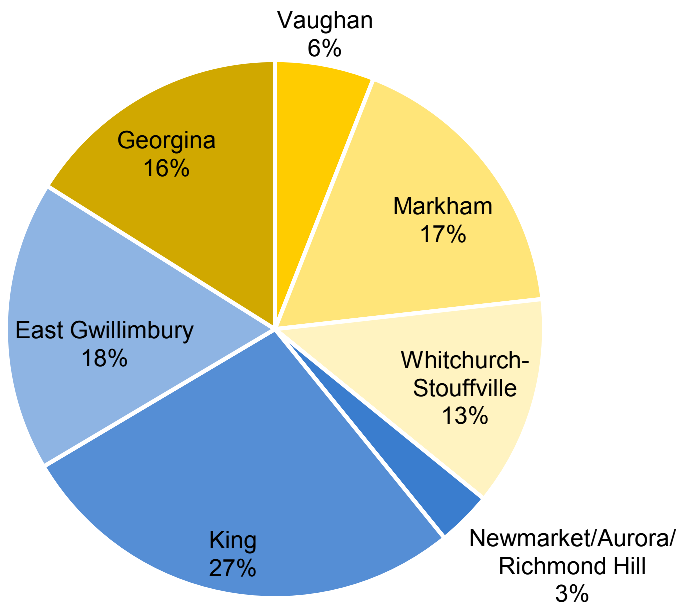

Figure 22: Cropland Area Breakdown in the Regional Municipality of York, 2016

Statistics Canada. Table 004-0203 - Census of Agriculture

Similar to the trend in declining number of farms, total cropland acres are experiencing a decline in the Region as well. The Region has experienced approximately a 20,000 acre decline in cropland since 2001, seen in Figure 23. However, the decline in cropland acres since 2001 is not occurring as quickly and as greatly as the total number of farms, leading to a higher average per-farm acreage of cropland (shown in figure 22).

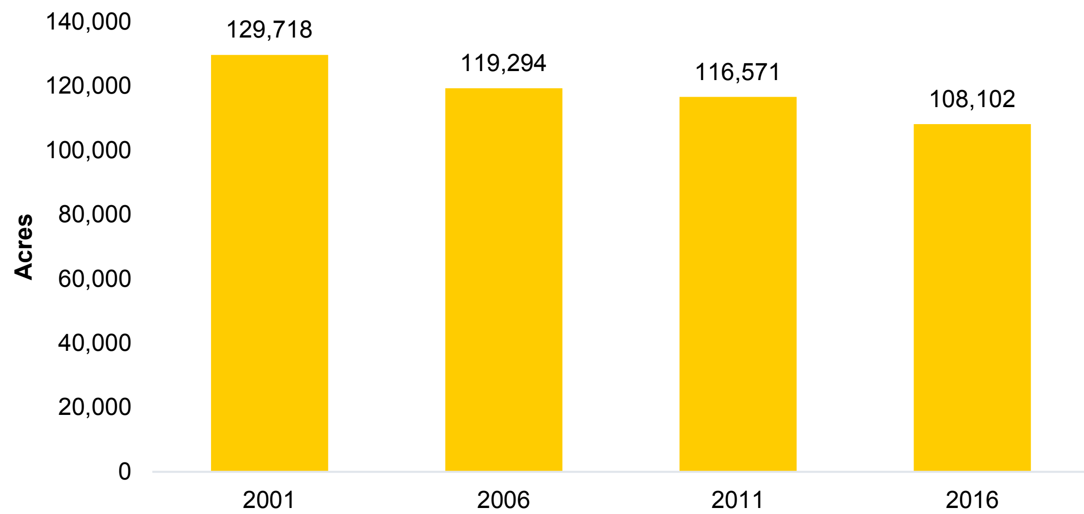

Figure 23: Total Cropland Acres (2001-2016)

Because total cropland acres have declined over time, this means that the proportion of land used for agriculture in York Region has decreased. At just over 100,000 acres in 2016, **York Region's cropland comprises of 23 per cent of the land base in the region.**[61]

Table 10 shows that cropland acres are not declining as fast as the number of farms, which could mean that consolidation of farms is occurring. In terms of cropland area, the Regional Municipality of York is not experiencing the largest decline in comparison to surrounding regions (decline of 7.3 per cent). As discussed above, the number of farms in York Region has declined 14 per cent in the past 5 years.

Table 10: Cropland Area in Acres in Ontario, York and surrounding Region – 2011-2016

Geography	2011	2016	% Change
Ontario	8,929,948	9,021,298	1.0%
Peel	74,193	67,408	-9.1%
Dufferin	120,956	117,272	-3.0%
Wellington	402,894	380733	-5.5%
Halton	61,673	52,602	-14.7%
Simcoe	363,436	372,901	2.6%
Durham	209,570	215,608	2.9%
York	116,571	108,102	-7.3%

Statistics Canada. Table 004-0203 - Census of Agriculture

[61] York Region's total land area is 435,400 acres or 1,762 square kilometres.

5.1.2 Gross Farm Receipts[62]

Although the agricultural sector in York Region has experienced declines in number of farms and acreage, gross farm sales are continuing to rise. This is a similar trend seen throughout Ontario. This trend is attributed to general inflation, farm efficiency, input costs per acre declining for some crops, an increase in food prices at the grocery store, and technological advancements (e.g. removing some labour costs). For example, the onion transplanter greatly reduced the hours of labour spent transplanting greenhouse-grown seedling onions into the ground. Many of the onion acres in the Holland Marsh are transplanted, and more and more farmers have adopted this technology recently. This is just one example of the many technological advancements that is making farming in York Region more efficient. The Canadian dollar experienced an average inflation rate of 2.07 per cent per year between 2001 and 2016, which accounts for some of the increase seen in gross farm sales.

Figure 24 highlights the increasing farm business income over time. Since 2001, farm gross sales have increased by 68%. As stated above, this increased farm business income occurs due to a range of innovations, market changes and advancements.

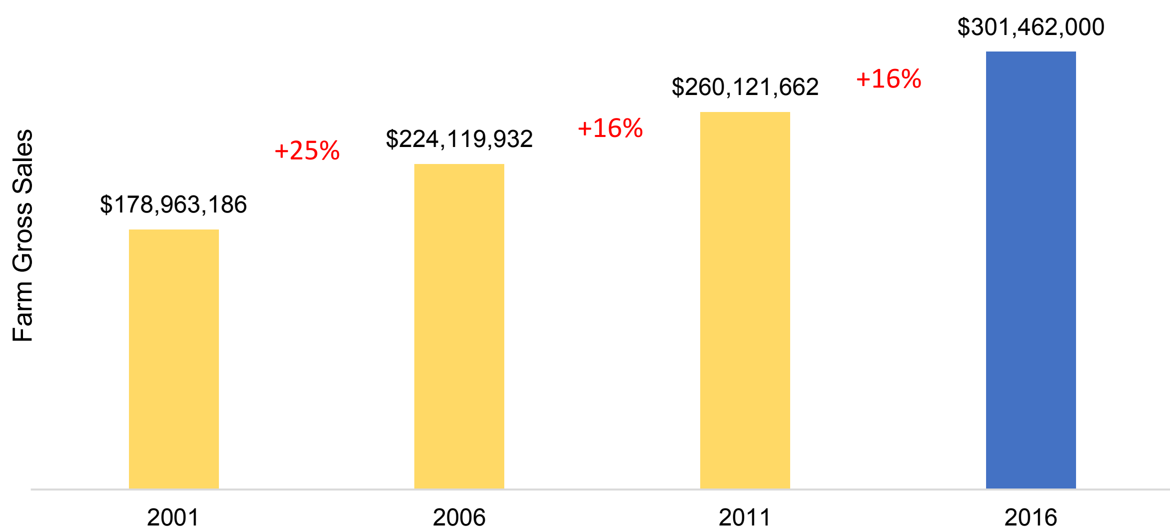

Figure 24: Total farm gross sales (2001 – 2016)

Between 2001 and 2006, farm gross sales increased by 25 per cent. Between 2011 and 2016, farm gross sales increased by 16 per cent. A prominent trend of greater sales in agriculture over time, despite declining farm numbers, is seen in York Region.

In terms of gross farm receipts per acre, York ranks #1 compared to the other surrounding regions. As illustrated in Table 11, York generated approximately $301.5 million in total gross farm receipts in 2016. There are 108,102 total acres of cropland in the region, resulting in

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[62] Gross Farm Receipts: Total farm business income received from the sale of agricultural commodities as well as direct program payments made to support or subsidize the agriculture sector.

$2,789 in gross farm receipts per acre. ***York's gross farm receipts per acre are approximately $1,000 greater than the provincial average gross farm receipts per acre. This indicates the high value and productivity level of agriculture in York Region relative to surrounding areas and the province overall.***

Gross Farm Receipts are compared to six neighbouring regions and the Province of Ontario in Table 11. The Regions of Halton, Durham, Peel and Simcoe have been selected based on their proximity and similarity to York Region in terms of proximity to GTA, and the significant growth demands in these areas. Dufferin and Wellington were selected as a way to identify contrasts, as these Regions have not yet experienced the same growth rate and pressures faced by Regions close to the GTA.

While York Region ranks 4th in these surrounding regions for its total gross farm receipts, it ranks 1st in gross farm receipts per acre

While York Region ranks 4th in these surrounding regions for its total gross farm receipts, it is ranked highest in gross farm receipts per acre.

Table 11: Ranking by Surrounding Regions of Total Gross Farm Receipts per Acre, 2016

	Total gross farm receipts		Acres			
Region	**2016**	**Percentage of Ontario**	**2016**	**Percentage of Ontario**	**Gross Farm Receipts per Acre (2016)**	**RANK by gross farm receipts per acre**
Ontario	$15,126,845,283		9,021,298		$1,677	n/a
York	$301,462,398	2.0%	108,102	1.2%	$2,789	1
Halton	$143,802,693	1.0%	52,602	0.6%	$2,734	2
Wellington	$943,242,755	6.2%	380,733	4.2%	$2,477	3
Durham	$321,749,341	2.1%	215,608	2.4%	$1,492	4
Peel	$94,134,919	0.6%	67,408	0.7%	$1,396	5
Dufferin	$157,496,017	1.0%	117,272	1.3%	$1,343	6
Simcoe	$447,757,741	3.0%	372,901	4.1%	$1,201	7

Statistics Canada. Table 004-0233 - Census of Agriculture

Figure 25 indicates the number of farms that are within each farm business income category.

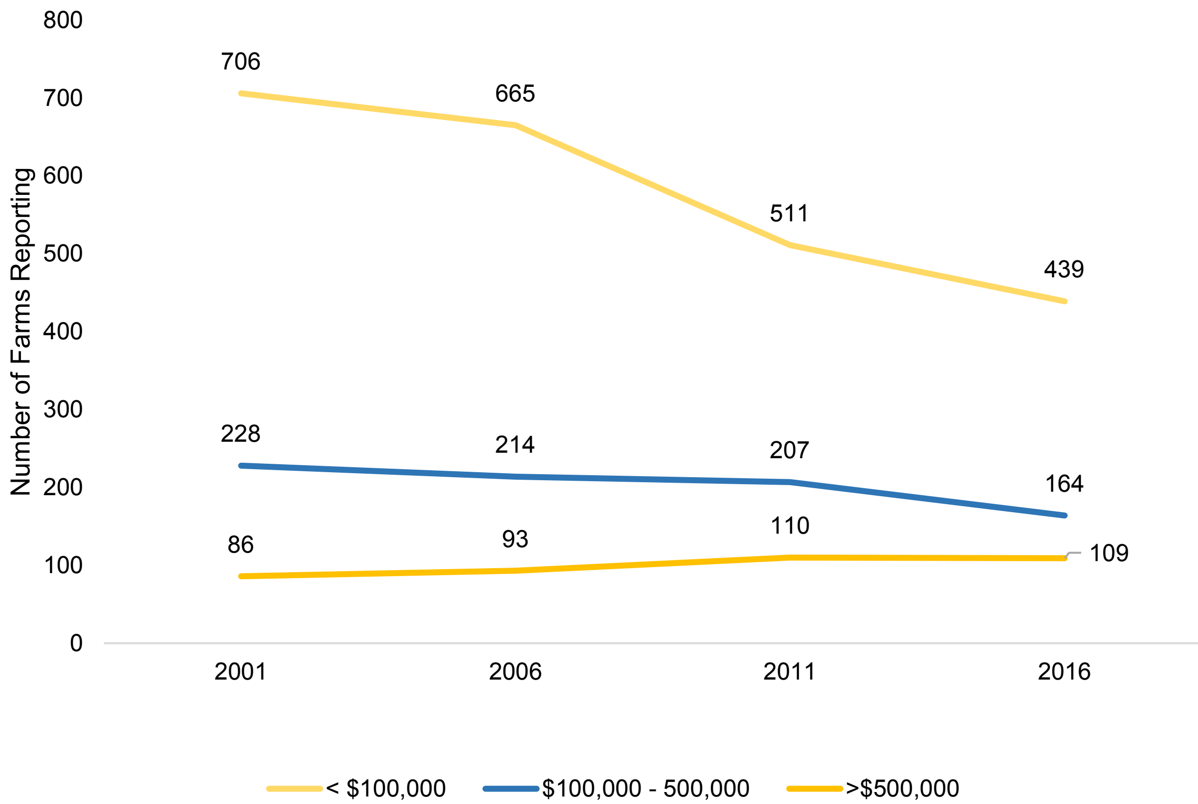

Figure 25: Gross Farm Receipts[63] - Number of farms reporting (2001-2016)

As the total number of farms in York Region has decreased since 2001, the number of farms in the *Gross Farm Receipts Less than $100,000* and *$100,000 to $500,000* categories has declined steadily. As farm sizes in the province have typically grown, along with farm revenues, the *Gross Farm Receipts Greater than $500,000* category has grown since 2001, and has stayed consistent in numbers from 2011 to 2016.

[63] Gross Farm Receipts: Total farm business income received from the sale of agricultural commodities as well as direct program payments made to support or subsidize the agriculture sector.

Broken down by the 7 Census Consolidated Subdivisions, East Gwillimbury provides York Region with the largest proportion of gross farm receipts and largest value in gross farm receipts per acre, as shown in Table 12.

Table 12: Ranking by Census Consolidated Subdivision in York, by Total Gross Farm Receipts per Acre (2016)

	Gross Farm Receipts				Acres			Rank by Gross Farm Receipts per Acre
Census Consolidated Subdivision	**2016**	**% Change from 2011**	**% of York**	**Rank by % York Gross Farm Receipts**	**2016**	**% Change from 2011**	**Gross Farm Receipts per Acre**	
East Gwillimbury	$96,797,280	40.1%	32.1%	1	18,872	-26.2%	$5,129	1
King	$83,898,106	17.4%	27.8%	2	29,535	0.9%	$2,841	3
Whitchurch-Stouffville	$33,724,735	-1.0%	11.2%	3	13,668	-31.1%	$2,467	4
Markham*	$33,164,453	27.5%	11.0%	4	18,648	115.0%	$1,778	6
Vaughan	$26,171,283	7.1%	8.7%	5	6,447	27.9%	$4,059	2
Georgina	$20,709,539	23.3%	6.9%	6	17,371	-28.0%	$1,192	7
Newmarket/ Aurora/Rich-mond Hill**	$6,997,002	13.7%	2.3%	7	3,561	-12.1%	$1,965	5

* The percent change in total acres for Markham is correct; potentially due to re-designation of agricultural land within the Rouge Park boundary. **The Census Consolidated Subdivisions separated Newmarket, Aurora, and Richmond Hill in the 2011 Census data. In the 2016 Census of Agriculture, the "Newmarket" Census Consolidated Subdivision included all three towns. Statistics Canada. Table 004-0233 - Census of Agriculture

Of particular note in Table 13 is East Gwillimbury's gross farm receipts per acre of $5,129. That is almost 5 times the provincial gross farm receipts per acre. This is attributed to the high value vegetable production in that area.

5.1.3 Direct Farm Marketing in York Region

For the first time, the 2016 Census of Agriculture collected data about the use of direct-to-consumer sales channels in Canada's agricultural industry. In Ontario, the most popular sales channels for farmers using direct market channels are farm gate/stand/kiosks/u-pick and farmers' markets with 90 per cent using gate/stand/kiosks/u-pick, and 22 per cent using farmers markets.[64] In York Region, 140 farms (20 per cent) reported selling agricultural products directly to consumers compared to an average of 15% across Ontario. 122 farms (17 per cent) reported using farm gate sales, stands, kiosks or u-pick, while 23 farms (3 per cent) reported using farmers' markets. 5 farms reported using Community Supported Agriculture (CSA) in York Region.[65]

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[64] OMAFRA, (2017). *Overview of Direct Farm Marketing in Ontario: 2016 Census of Agriculture.*

5.1.4 Land Tenure in York Region

The rates of rented, leased and crop shared lands is known to be fairly high in the GTA. York's rented land peaked in 2001, and then slowly declined. In 2016, amount of rented land was similar to amount of owned land. Table 13 shows this trend. In Newmarket/Aurora/Richmond Hill, approximately 65 per cent of the land is either rented, leased, or crop shared, which is the highest of all York lower-tier municipalities. The remainder is owned and operated land. This indicates a much higher level of agricultural land ownership is by non-farmers than the provincial average. As is indicated in Table 14 below, most lower-tier municipalities have experienced declines in the proportion of rented land to owned land, except for Newmarket, Aurora, and Richmond Hill.

Table 13: Percentage of Farmland Rented, Leased, or Crop Shared in Ontario, York, and Lower-Tier Municipalities, 2011-2016

	Total Farm Area Rented, Leased or Crop Shared (%)		
	2011	**2016**	**% Change**
Ontario	32.8%	32.4%	-0.4%
York	56.3%	52.7%	-3.6%
Vaughan	43.6%	38.6%	-5.0%
Markham	71.0%	42.6%	-28.4%
Whitchurch-Stouffville	66.3%	53.2%	-13.1%
Newmarket/Aurora/Richmond Hill*	60.8%	64.9%	4.1%
King	56.2%	56.9%	0.7%
East Gwillimbury	53.5%	44.7%	-8.8%
Georgina	45.2%	43.4%	-1.8%

*The Census Consolidated Subdivisions separated Newmarket, Aurora, and Richmond Hill in the 2011 Census data. In the 2016 Census of Agriculture, the "Newmarket" Census Consolidated Subdivision included all three towns. Statistics Canada. Table 004-0204 - Census of Agriculture

Figure 26 shows the differences in percentages of rented, leased, or crop shared land in the province of Ontario and the Regional Municipality of York. In Ontario, rented land has stayed consistent in the past five years and has declined minimally in the Regional Municipality of York.

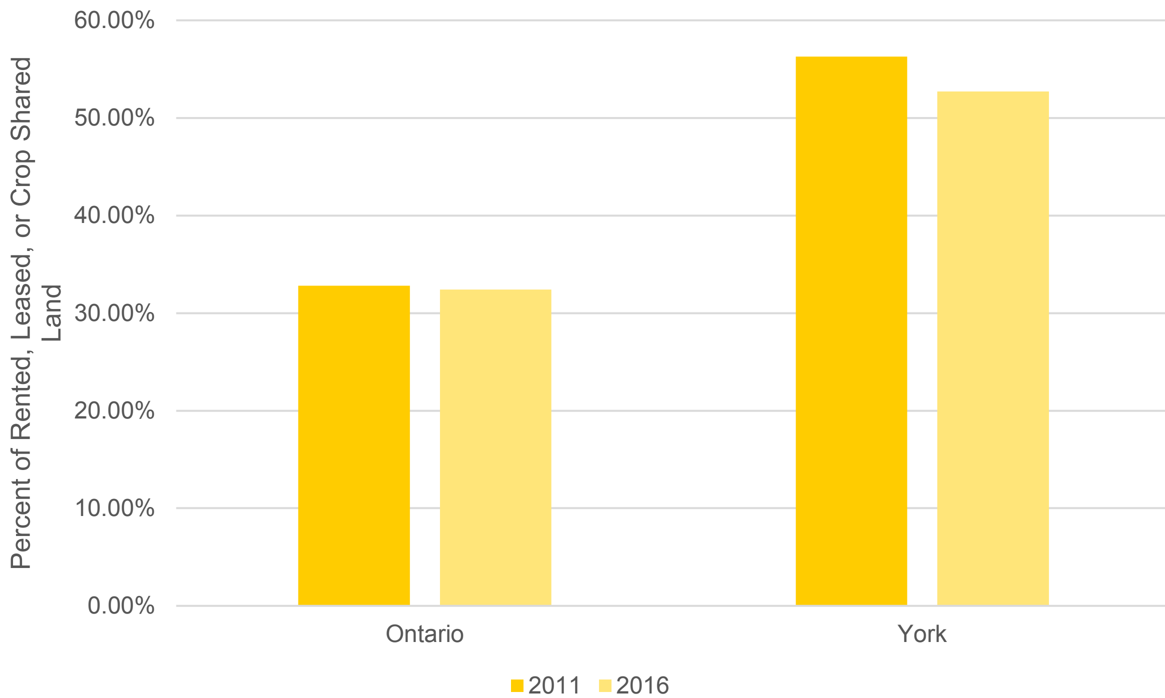

Figure 26: Percentage of Farmland Rented, Leased, or Crop Shared in the Ontario and York Region (2011-2016)

Statistics Canada. Table 004-0204 - Census of Agriculture

6.0 Economic Analysis of York Region's Agri-Food Sector

6.1 Introduction

The agri-food industry in York Region is a contributor to the economy across all lower-tier municipalities. This section uses several different economic analysis techniques to quantify the impact in both absolute terms and in relation to other industries within the regional economy.[66]

The agri-food industry contributes between 9 per cent and 19 per cent of the jobs in each municipality and the number of jobs has been growing over time in absolute terms. While this may seem inconsistent with increased urbanization and declining numbers of people involved in primary production, it arises because most of the jobs in the agri-food industry are at the consumer end – in food manufacturing as well as restaurant and grocery store workers. The growth in jobs in retail sectors are highly correlated with population growth. Therefore, as the population in York has grown, the number of jobs in grocery stores and restaurants has also grown.

There are sectors along the agri-food supply chain, such as food processing that demonstrate relative strength within the Region's economy and therefore represent potential opportunities. These sectors also show leverage and impact on the regional economy similar to other sectors that have traditionally been the focus of economic development efforts, such as technology and manufacturing. There are opportunities in the agri-food industry in York Region that, with support, could yield similar positive results for the regional economy to other industries and sectors. Examples include the vegetable growing and processing sectors as well as grass-based livestock production.

This section begins with an overview of the total economic impact of York Region's primary production sector, followed by an analysis of the agri-food sector's contribution to employment. Next, there is an analysis of sector competitiveness and growth as well as an overview and comparison of regional requirements (opportunities for import substitution in the Region). This section concludes with an input-output analysis. These economic analysis techniques provide an opportunity to compare York Region's agri-food sector to other industries within the Region, as well as agri-food sectors outside of the Region (e.g. neighbouring regions; the wider Golden Horseshoe Region).

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[66] Unless otherwise noted, all analysis in this section was conducted using Emsi 2016 Data Set through OMAFRA's Analyst tool. It is based on data from StatCan's National Symmetric Input-Output table, National Household Survey commuting flows, Canadian Business Patterns, and several Emsi in-house data sets.

6.2 Total Economic Impact of the Primary Production Sector

The economic impact of primary production agriculture[67] in York Region extends well beyond the $302 million of direct farm cash receipts in 2016. When the indirect and induced economic activity are included the total economic impact is over $552 million. The following are definitions of the three levels of economic impact used in this analysis:

- Direct economic impact is the value of the primary agricultural sales.
- Indirect economic impact is the economic activity created by the businesses that interact directly with farms such as farm supply businesses, grain elevators, veterinarians, accountants, insurance companies and vegetable processors.
- Induced economic impact is the economic activity generated by the household spending of people in the direct and indirect industries. Examples would include household utilities, groceries, housing, and restaurants.

Estimating the economic impact of an industry has several challenges. Primary among them is the issue of double counting. If more than one step in a supply chain is included, the output of the further step in the supply chain will be counted as both direct output for that sector but will also show up in the indirect output of the primary step. Thus, using just the primary production output is a conservative estimate of the total economic impact.

Table 14: Total Economic Impact of Primary Production in York Region, 2016

	Output	GDP basic price	Labour income	Jobs
Direct	$301,500,000	$124,196,293	$60,757,681	2,230
Direct + Indirect	$484,577,726	$210,102,584	$113,493,904	3,208
Direct + Indirect + Induced	$551,964,058	$249,995,470	$132,676,487	3,578

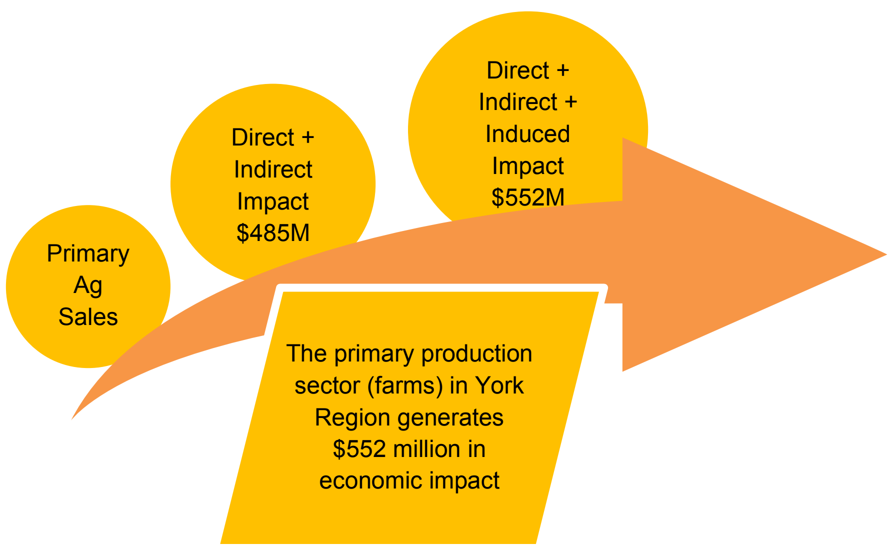

Figure 27: York Region Primary Production (Farms) Sector Economic Contribution

[67] Total economic impact has been calculated for primary production rather than the entire agri-food value chain. Primary production was selected for analysis as calculating for the entire agri-food sector tends to overstate economic contribution (due to double counts).

- In 2016, estimated primary agriculture sales of $302 million generated $552 million in economic impact
- This extends to:
    - $250 million in Gross Domestic Product (GDP)
    - 3578 jobs
    - $133 million in wages and salaries

The indirect and induced multipliers used to calculate the total economic impact were established empirically by Statistics Canada. The national multipliers show the direct, indirect, and induced effects on gross output, GDP and jobs. They are derived from the Statistics Canada input-output tables and are used to assess the effects on the economy of a given industry. They provide a measure of the interdependence between an industry and the rest of the economy.

Table 15 provides estimates of the output, GDP, labour income, and jobs generated by the entire agri-food industry in York Region. The direct contribution of each sector creates $6.3 Billion in economic output, $1.8 billion in labour income and 57,000 jobs. The indirect and induced impacts have not been presented in order to avoid double-counting as mentioned previously in this section.

Table 15: Total Direct Impact of Agri-Food Industry in York Region

	Output	GDP basic price	Labour income	Jobs
Direct	$6.3 Billion	$2.7 Billion	$1.8 Billion	57,000

6.3 York Region Employment – Agri-food Sector

The following table (Figure 28) illustrates job trends in the agri-food sector as classified by North American Industry Classification (NAICS) Code. The codes selected for this analysis include the full agri-food value chain from farms right through to food manufacturing, grocery retail and food service (restaurants). For a full list of the 27 sectors included and their descriptions, please see the Appendix G.

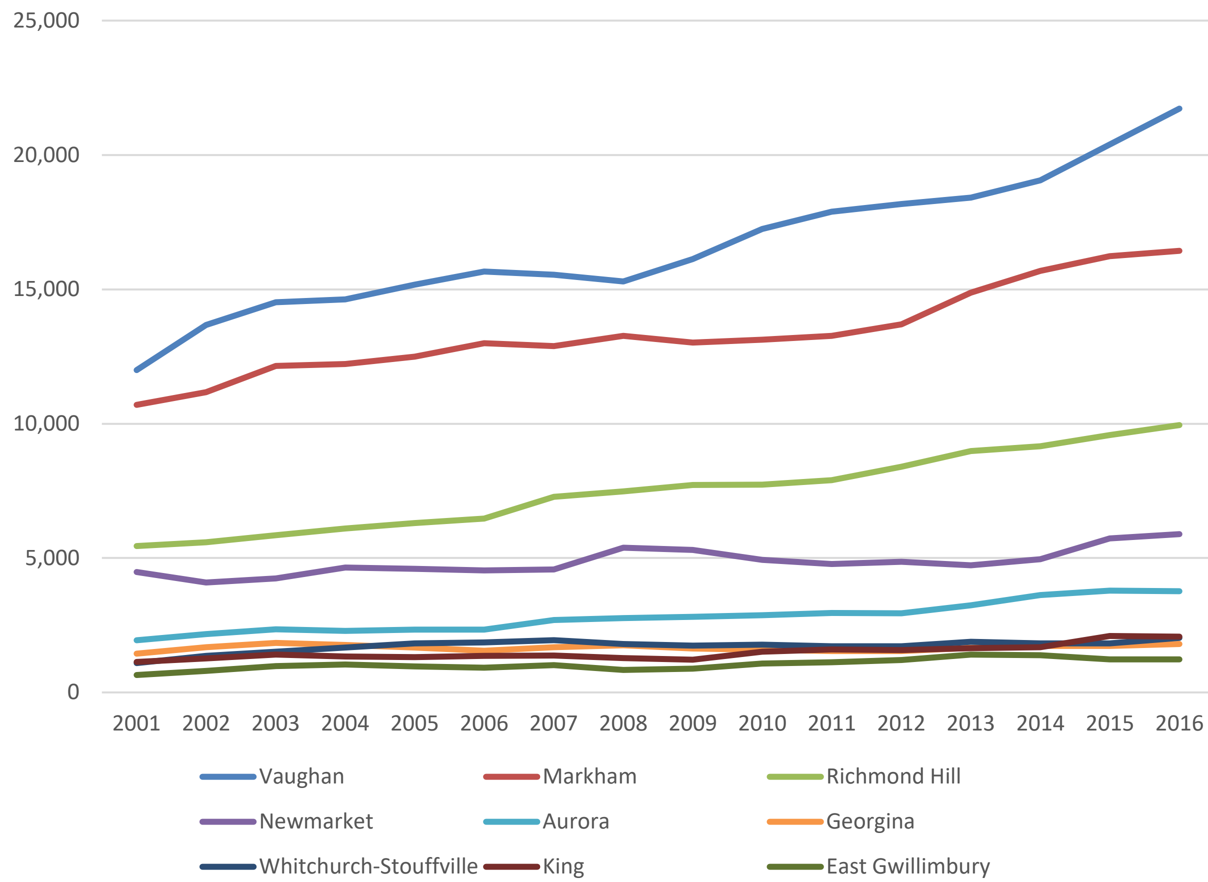

Figure 28: Agri-Food Jobs by lower tier municipality[68]

The 27 industries included in York Region's agri-food sector, from primary production to retail, account for 11 per cent of total employment in York Region. This number remains consistent across most of the lower-tier municipalities. While it makes up a larger percentage (19 per cent) in King, this accounts for a small percentage of the Region's total employment. Figure 29 below shows how much of the total employment agri-food accounts for in each lower-tier municipality.

[68] Emsi Q3 2016 Data Set

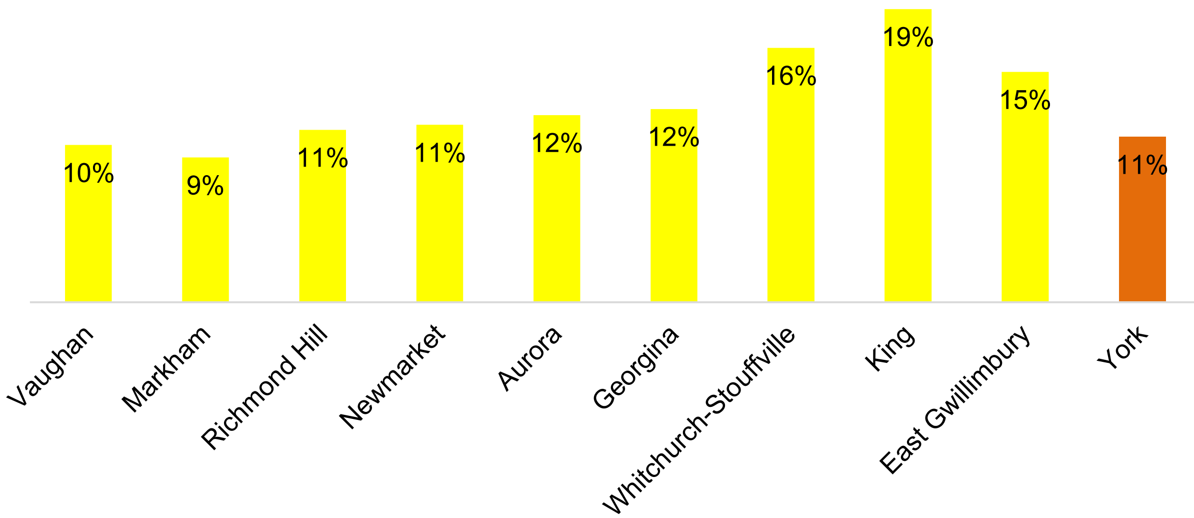

Figure 29: York Region and Lower Tier Municipality – Total agri-food employment, 2016

6.4 Sector Competitiveness and Growth

Two metrics that can be used to provide a view of the industry's performance over time are Location Quotient and Competitive Effect. Provincial Location Quotient (PLQ) compares the relative concentration in the local Region to the concentration in the provincial economy. The Competitive Effect (CE) is being used as a relative measure of performance of an industry over a period of time in the Region compared to the provincial economy.

Using these two indicators, sectors can be divided into four general categories:

- Gaining (top left quadrant, blue)
- Thriving (top right quadrant, green)
- Diminishing (bottom left quadrant, red)
- Moderating (bottom right quadrant, yellow)

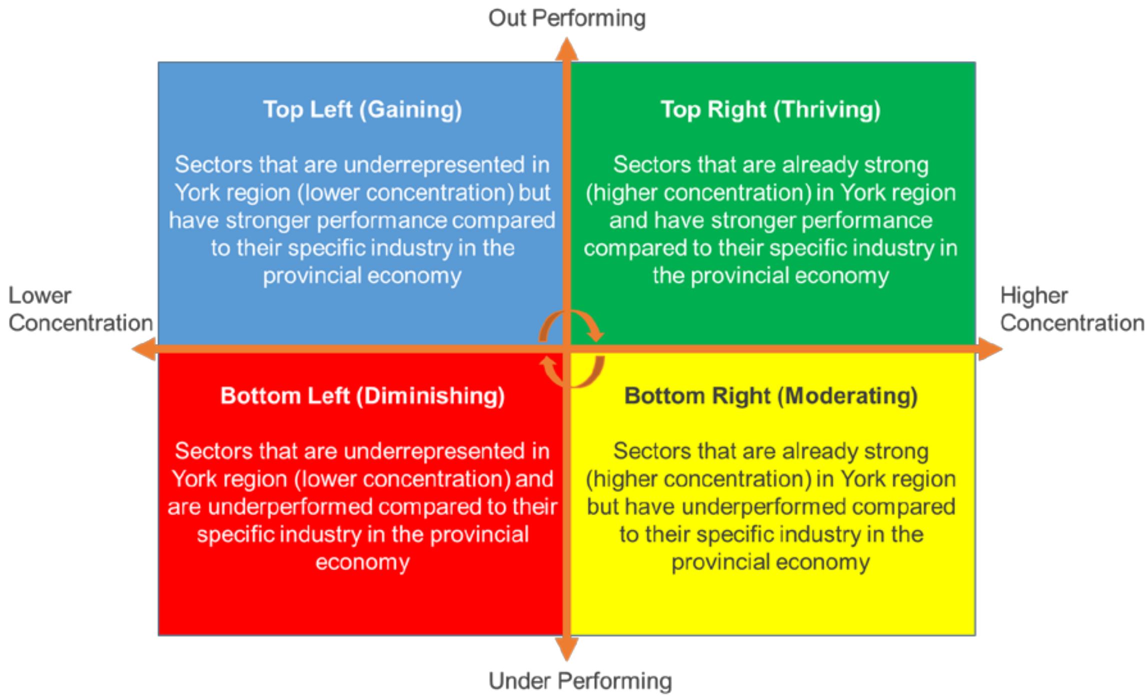

Figure 30: Sector Competitiveness and Growth Quadrants

The following figure shows the PLQ and CE for the key agri-food sectors. The size of the bubbles indicates the number of jobs within the industry. Broadly, agri-food has a relatively higher concentration in York Region the farther along the supply chain one goes from primary production agriculture. Wholesaling, warehousing, and light manufacturing all have PLQ's greater than one. Compare this with farms, animal feed manufacturing, and grain and oilseed milling with PLQ's below 0.4. From a competitive effect point of view, all sectors in York Region are 'holding their own' in the broad context of the Ontario Agri-Food Industry. The one result that may surprise some, is that 'Farms' is in the Gaining quadrant. While Farms are lower in concentration in the York Region Economy than the provincial economy, they were competitive over the 2006-2016 time frame.

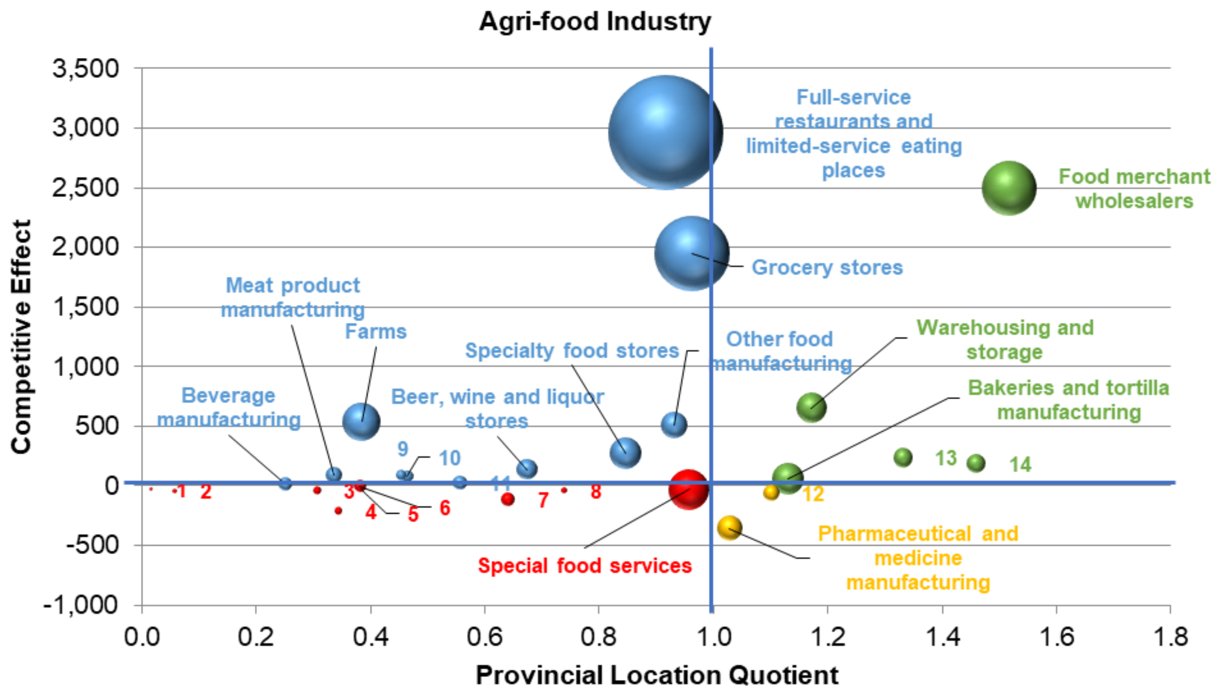

Figure 31: Competitive Effect vs. Provincial Location Quotient – Agri-food industry in York Region, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Bubble size represents total employment in the sector.

Table 16: Legend for Bubble Numbering in Figure 31

(red)	1	Animal food manufacturing
(red)	2	Grain and oilseed milling
(red)	3	Beverage merchant wholesalers
(red)	4	Farm product merchant wholesalers
(red)	5	Seafood product preparation and packaging
(red)	6	Agricultural, construction and mining machinery manufacturing
(red)	7	Farm, lawn and garden machinery and equipment merchant wholesalers
(red)	8	Pesticide, fertilizer and other agricultural chemical manufacturing
(blue)	9	Support activities for farms
(blue)	10	Agricultural supplies merchant wholesalers
(blue)	11	Dairy product manufacturing
(yellow)	12	Lawn and garden equipment and supplies stores
(green)	13	Fruit and vegetable preserving and specialty food manufacturing
(green)	14	Sugar and confectionery product manufacturing

Sector Competitiveness and Growth

Green - Thriving

Sectors that are already strong (higher concentration) in the Region and have stronger performance compared to their specific industry in the provincial economy

Blue - Gaining

Sectors that are underrepresented in York Region (lower concentration) but have stronger performance compared to their specific industry in the provincial economy

Yellow - Moderating

Sectors that are already strong (higher concentration) in York Region but have underperformed compared to their specific industry in the provincial economy

Red - Diminishing

Sectors that are underrepresented in York Region (lower concentration) and are underperformed compared to their specific industry in the provincial economy

Figure 32 presents which quadrant each agri-food sector falls into. The classifications are identical to the ones presented in the previous figure.

Gaining

- Agricultural supplies merchant wholesalers
- Beer, wine and liquor stores
- Beverage manufacturing
- Dairy product manufacturing
- Farms
- Full-service restaurants and limited-service eating places
- Grocery stores
- Meat product manufacturing
- Other food manufacturing
- Specialty food stores
- Support activities for farms

Thriving

- Bakeries and tortilla manufacturing
- Food merchant wholesalers
- Fruit and vegetable preserving and specialty food manufacturing
- Sugar and confectionery product manufacturing
- Warehousing and storage

Diminishing

- Agricultural, construction and mining machinery manufacturing
- Animal food manufacturing
- Beverage merchant wholesalers
- Farm product merchant wholesalers
- Farm, lawn and garden machinery and equipment merchant wholesalers
- Grain and oilseed milling
- Pesticide, fertilizer and other agricultural chemical manufacturing
- Seafood product preparation and packaging
- Special food services

Moderating

- Lawn and garden equipment and supplies stores
- Pharmaceutical and medicine manufacturing

Figure 32: Provincial Location Quotient vs. Competitive Effect - York Region Agri-food Industries, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving.

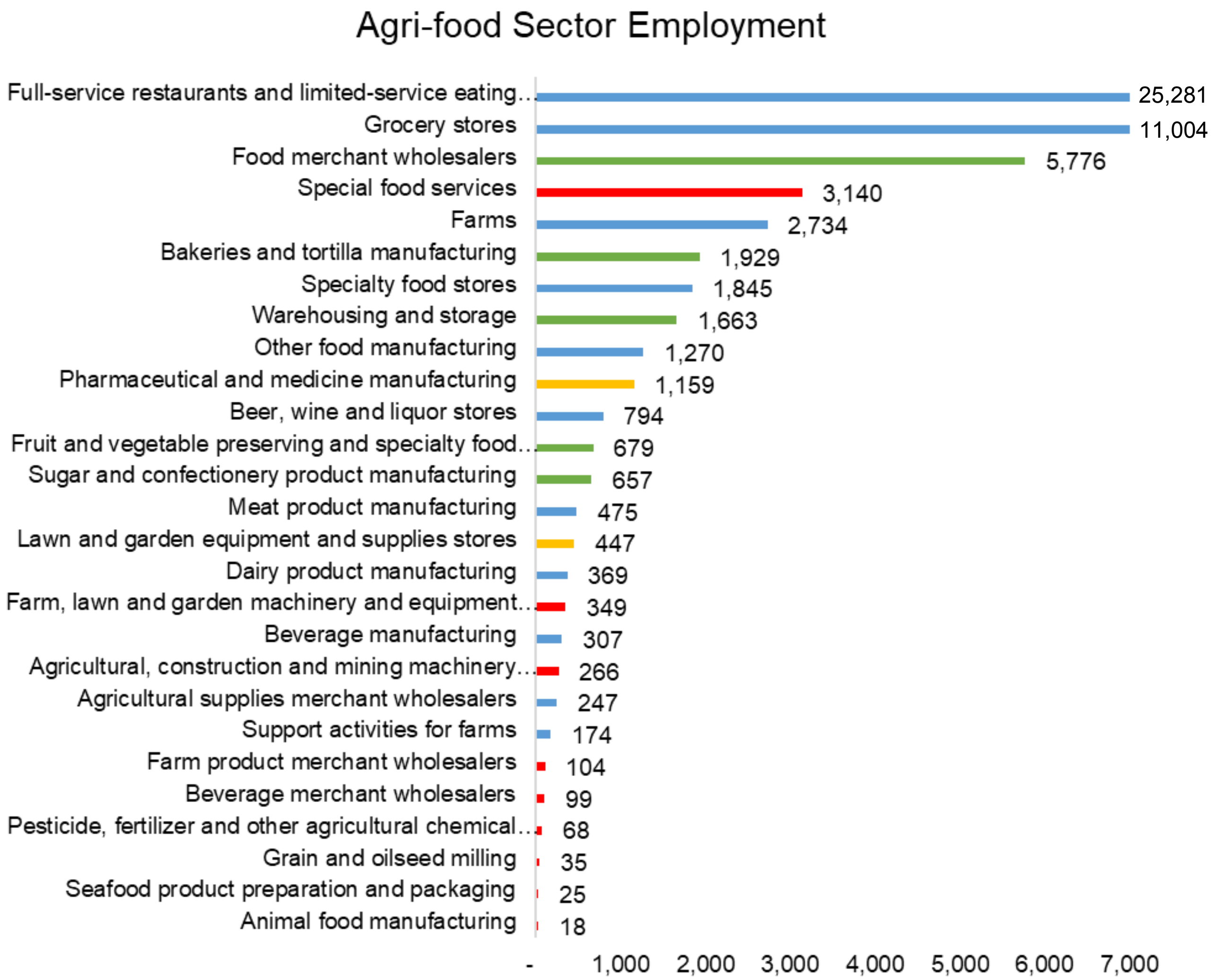

Figure 33: York Region 2016 employment numbers for each agri-food sector. Bars are coloured according to the quadrant that each falls into. Red indicates the sector is diminishing, blue that the sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Numbers presented are FTEs and include self-employed and seasonal workers.

When a comparison is made between the Farms sector in York and surrounding upper-tier municipalities/regions, Farms in York are remaining competitive both provincially and regionally. As well, the broader Region is remaining competitive compared to the provincial level. Not surprisingly, York, Peel, and Halton have PLQs below 1.0. Dufferin and Wellington were included to show the positioning of municipalities in Central Ontario that do not have the same urbanization pressures that York and the other municipalities have.

> **Note:** Jobs are defined as any position in which a worker provides labour in exchange for monetary compensation, including those who work as employees for businesses and proprietors who work for themselves. Emsi reports employment as annual job averages. Due to limitations of source data, both full- and part-time jobs are included and counted equally, e.g. job counts are not adjusted to full-time equivalents.

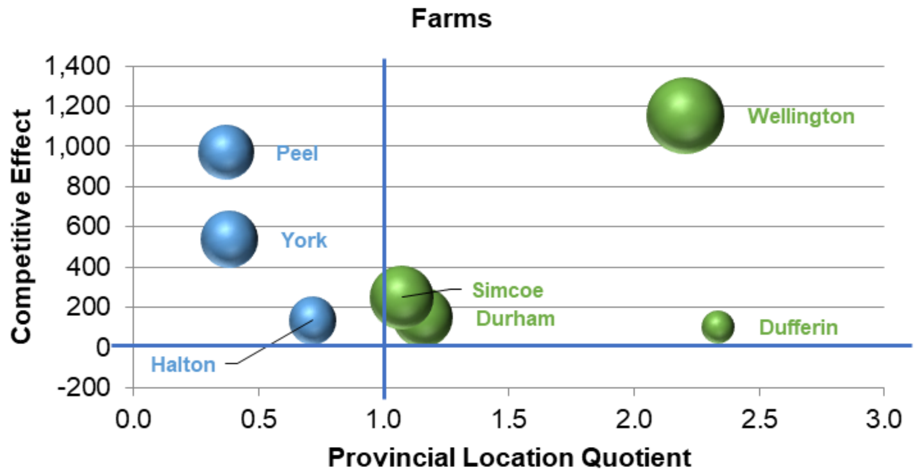

Figure 34: Competitive effect vs. Provincial Location Quotient – Farms in York Region, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Bubble size represents total employment in the sector.

The following charts show the competitive position of various sectors along the agri-food supply chain. Each highlighted sector shows strong differentiation between the municipalities for a different reason.

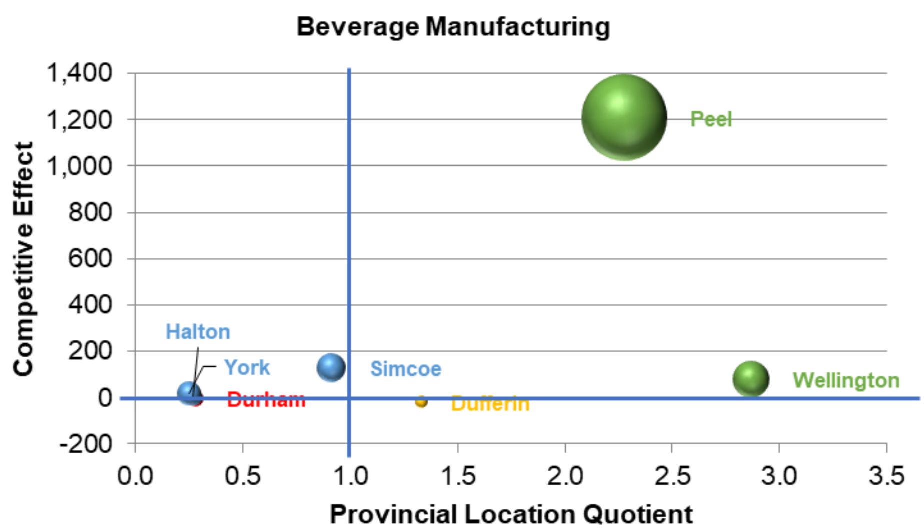

Figure 35: Competitive Effect vs. Provincial Location Quotient - Beverage Manufacturing in York Region, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Bubble size represents total employment in the sector.

The beverage manufacturing sector, as shown in Figure 35, is in the “gaining” quadrant which may be an opportunity. However, differences in the regulation of water resources is the primary reason for the significantly lower PLQ in York. Unless York is willing to modify its water regulations, it is unlikely that York will attract additional enterprises.

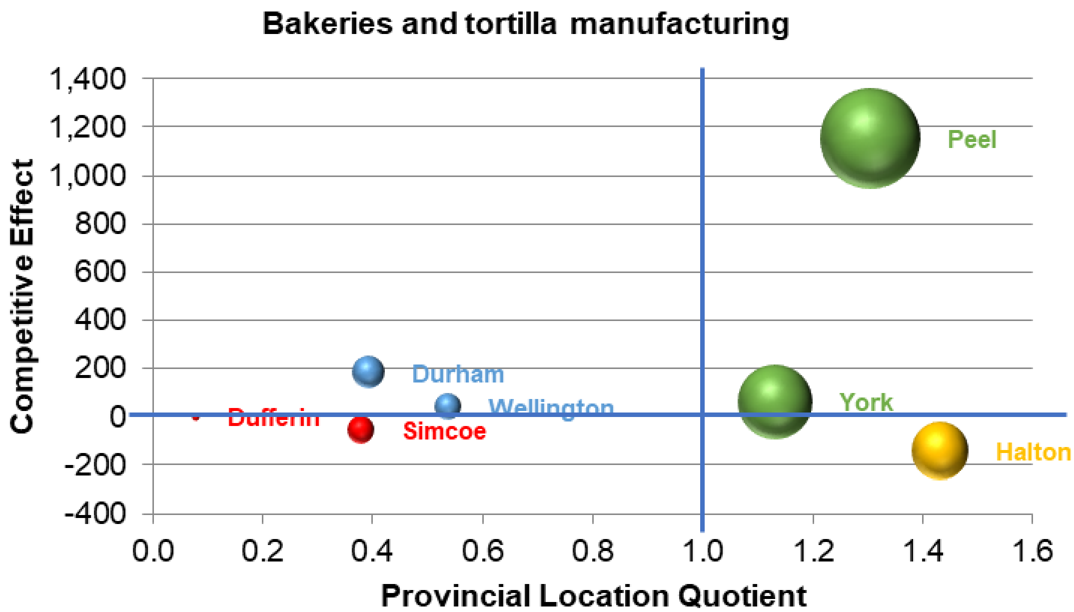

Figure 36: Competitive Effect vs. Provincial Location Quotient - Bakeries and tortilla manufacturing in York Region, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Bubble size represents total employment in the sector.

Two food manufacturing sectors are in the "thriving" quadrant and thus show strength for York – Bakeries and Tortilla Manufacturing, and Fruit and Vegetable Processing. The Bakeries cluster in the GTA is one of the largest in North America and historically has had strong performance. The PLQ values greater than one (1.0) for York, Peel, and Halton are indicators of the concentration of the sector in the GTA. The primary driver of the location of this cluster was access to ingredients combined with access to markets. It is more cost effective to transport the primary ingredients (grains and sugar) for bakery and tortilla products long distances in bulk and then process them close to the consumption markets. The ports on Lake Ontario and Lake

Huron provide access to ingredients transported by water. The cluster is uniquely positioned within a day's drive of both New York and Chicago for delivery of finished products.

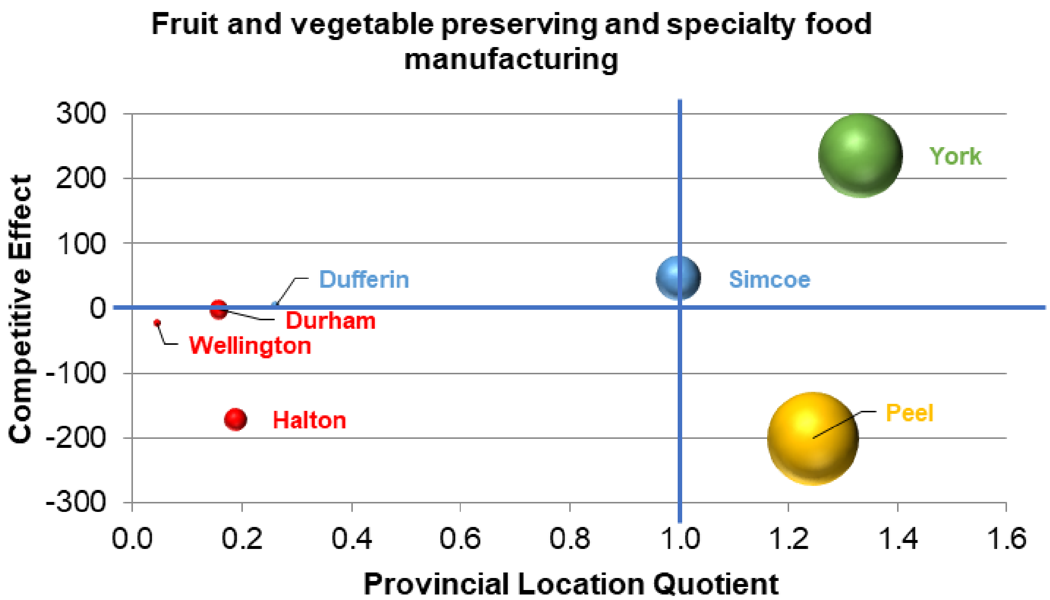

Figure 37: Competitive Effect vs. Provincial Location Quotient - Fruit and veg, preserving and specialty food manufacturing in York Region, 2006-2016. Red indicates the sector is diminishing, blue that that sector is gaining, yellow that the sector is moderating, and green that the sector is thriving. Bubble size represents total employment in the sector.

The Fruit and Vegetable Processing sector benefits from the proximity to primary crop production and the general warehousing, transportation and labour force characteristics of the Region. Proximity to the processing plant is an important factor for maintaining the quality of harvested produce between the field and the processing plant. Each cluster of processing vegetable production in Ontario is centered around a processing plant.

All three of these sub-sectors benefit from York Region's access to a strong consumer base in York Region and the Greater Toronto Area.

6.5 Regional Requirements

The regional requirements report quantifies the goods and services that a region requires from each industry, as well as the degree to which those requirements are met within the Region. The **Per Cent Demand met In-Region** displays the percentage of the amount spent on an industry by all business and population in the given region that is met within the regional economy. The **Per Cent Demand met by Imports** displays the percentage of the amount spent on an industry by all businesses and population in a given region met outside the regional economy.

The table below shows the total demand for each agri-food sector in York Region and the greater economic region, and how much of that demand is met by the respective region and how much is imported from outside the Region. Regional Requirements analysis can be sensitive to the geographic region selected. Economic regions don't necessarily follow political boundaries. The "Greater Economic Region" is presented in the table below to serve as a check for the results obtained at the York Region level.

Regional Requirements Analysis is effective at identifying which sectors have potential opportunities for investment by highlighting which sectors' outputs are in significantly greater demand than that sector's production. This analysis identifies opportunities for "regional import substitution."

The sector values highlighted in red represent sectors where regional imports are filling more than 50 per cent of the demand for its outputs. Within the agri-food sectors listed in the following table, the largest opportunity is in primary production with 71.9 per cent of $1.1 billion being imported – a situation that is mirrored in the results for the Greater Economic Region. Other potential opportunities are Meat Product Manufacturing and Beverage Manufacturing. However, when The Greater Economic Region is considered, the demand is largely being met within the Region. Therefore, they are not good candidates for development.

Table 17: Regional Requirements for York Region and Greater Economic Region - Agri-Food Sector, 2011

NAICS	Demand for	% Demand met In-Region	% Demand met by Imports	Total Demand	% Demand met In-Region	% Demand met by Imports	Total Demand
		York Region			Greater Economic Region - Durham, York, Peel, Halton, Simcoe		
7225	Full-service restaurants and limited-service eating places	62.2%	37.8%	$1,810,450,986	67.2%	32.8%	$6,785,362,260
1110	Farms	28.1%	71.9%	$1,105,780,909	32.4%	67.6%	$5,922,030,970
4451	Grocery stores	51.6%	48.4%	$737,710,348	77.5%	22.5%	$2,729,145,832
3254	Pharmaceutical and medicine manufacturing	56.2%	43.8%	$657,929,680	56.6%	43.4%	$3,207,649,530
3116	Meat product manufacturing	22.8%	77.2%	$584,004,082	68.1%	31.9%	$3,105,553,561
3121	Beverage manufacturing	19.9%	80.1%	$502,615,931	75.8%	24.2%	$2,004,387,200
4131	Food merchant wholesalers	55.5%	44.5%	$488,388,680	60.4%	39.6%	$1,868,416,598
3118	Bakeries and tortilla manufacturing	54.3%	45.7%	$464,844,812	64.9%	35.1%	$2,105,884,060
3331	Agricultural, construction and mining	19.9%	80.1%	$452,673,354	32.9%	67.1%	$1,815,069,037

	machinery manufacturing						
3115	Dairy product manufacturing	51.3%	48.7%	$440,899,682	52.6%	47.4%	$1,662,715,060
3119	Other food manufacturing	59.7%	40.3%	$351,565,073	64.2%	35.8%	$1,550,343,436
3113	Sugar and confectionery product manufacturing	60.0%	40.0%	$313,815,279	71.2%	28.8%	$924,676,817
3114	Fruit and vegetable preserving and specialty food manufacturing	67.6%	32.4%	$303,264,485	73.5%	26.5%	$1,133,078,538
7223	Special food services	62.9%	37.1%	$186,340,631	78.4%	21.6%	$719,902,601
4931	Warehousing and storage	45.4%	54.6%	$142,174,951	63.7%	36.3%	$609,809,486
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	39.0%	61.0%	$104,967,938	38.3%	61.7%	$394,715,784
4453	Beer, wine and liquor stores	35.9%	64.1%	$104,798,080	65.3%	34.7%	$387,957,994
3117	Seafood product preparation and packaging	7.6%	92.4%	$103,917,769	5.4%	94.6%	$388,884,634
3111	Animal food manufacturing	3.1%	96.9%	$98,199,396	74.5%	25.5%	$583,636,655
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	32.8%	67.2%	$90,805,675	32.1%	67.9%	$416,760,452
4452	Specialty food stores	52.1%	47.9%	$86,738,447	55.0%	45.0%	$319,617,409
4183	Agricultural supplies merchant wholesalers	30.0%	70.0%	$75,380,035	41.9%	58.1%	$298,269,705
4111	Farm product merchant wholesalers	21.6%	78.4%	$44,705,397	57.9%	42.1%	$195,916,523
4132	Beverage merchant wholesalers	11.7%	88.3%	$31,588,803	60.9%	39.1%	$146,564,131
4442	Lawn and garden equipment and supplies stores	80.4%	19.6%	$23,805,431	87.6%	12.4%	$87,704,363
1150	Support activities for farms	50.2%	49.8%	$7,906,388	60.8%	39.2%	$40,107,108

The following table presents the same data for the ten largest sectors (by total demand) in York Region. Two of the largest unmet demand opportunities are in sectors that York Region has very little ability to impact – Provincial Public Administration, and Petroleum and Coal Product Manufacturing. The scale of the opportunity in Farms is of the same order of magnitude as the opportunities in Motor Vehicle Parts Manufacturing and Motor Vehicle Manufacturing. However, there is a significant difference in the structure of the sectors, they are characterized by single large investment decisions. Either the Region wins the competition to attract a major automobile manufacturer or it doesn't. Whereas, the gains in Farms are incremental, can be sustained over time, and aren't in direct competition with neighbouring jurisdictions.

Table 18: Regional Requirements for York Region and Greater Economic Region - Ten Largest Sectors, 2011

NAICS	Demand for	% Demand met In-Region	% Demand met by Imports	Total Demand	% Demand met In-Region	% Demand met by Imports	Total Demand
		York Region			Greater Economic Region - Durham, York, Peel, Halton, Simcoe		
3363	Motor vehicle parts manufacturing	35.0%	65.0%	$4,420,820,200	62.3%	37.7%	$20,034,403,865
9120	Provincial and territorial public administration	1.1%	98.9%	$3,522,330,049	3.1%	96.9%	$13,058,462,581
5311	Lessors of real estate	60.8%	39.2%	$2,709,897,272	58.5%	41.5%	$9,887,424,653
2361	Residential building construction	82.8%	17.2%	$2,582,611,983	80.2%	19.8%	$9,366,053,367
5221	Depository credit intermediation	39.8%	60.2%	$2,487,319,303	45.1%	54.9%	$9,031,732,818
3361	Motor vehicle manufacturing	37.3%	62.7%	$2,311,922,670	22.2%	77.8%	$22,257,192,526
3241	Petroleum and coal product manufacturing	7.6%	92.4%	$2,145,146,049	44.4%	55.6%	$10,809,340,979
9130	Local, municipal and regional public administration	27.4%	72.6%	$2,135,600,487	60.1%	39.9%	$7,899,025,641
6111	Elementary and secondary schools	27.9%	72.1%	$2,031,280,265	57.0%	43.0%	$7,481,865,286
5415	Computer systems design and related services	49.4%	50.6%	$1,588,252,548	60.3%	39.7%	$4,722,260,334
7211	Traveler accommodation	34.6%	65.4%	$537,384,581	37.7%	62.3%	$2,016,262,813

The previous section identified primary production agriculture as a sector with significant unmet demand in York Region. The question now becomes, is meeting that demand an opportunity that is feasible, realistic and worth investing economic development efforts to influence? The following sections attempt to answer that question from several points of view, including: is the return to effort in this sector similar to the return in other sectors, what is the relative strength of the sector, and are there opportunities to pursue in the near term?

6.6 Input-Output Scenarios

The tables below show the results of modelling the effect of adding 100 additional jobs to each sector, and its effect on wages. Effects are shown for both York Region and the greater economic region. Select agri-food sectors are compared to the computer systems design industry. This analysis was generated using the Input-Output model in EMSI's Analyst tool. There are two different types of multipliers listed below. The **Earnings Multiplier** indicates how much is paid out in wages, salaries, and other compensation throughout your economy for a given scenario. For example, an Earnings Multiplier of 2 means that for every $1 generated, $2 is paid out. This is important for understanding how a given scenario will affect not the number of jobs in your region, but the quality of those jobs. The **Jobs Multiplier** indicates how important an industry is to job creation. For example, a Jobs Multiplier of 2 would mean that for every job created by that industry, one other job would be created in other industries, for a total of two jobs.

Looking at wages (Table 19), the agriculture and food sector average ranges from $33,807 to $63,884 depending on the sector sub-category. In comparison to other key sectors - residential building construction average is $47,192 and motor vehicle parts manufacturing average is $63,125. While some agriculture and food jobs have lower average wages than these two sectors, there is a range within agriculture and food which overall is comparable/competitive with these other sectors.

From an employment standpoint, agriculture and food sector jobs have a multiplier effect ranging from 1.8 to 2.79 depending on the sector sub-category. Residential building construction jobs multiplier is very strong at 3.24 and motor vehicle parts manufacturing has a multiplier of 1.44 which is lower than any sub-sector of agriculture and food.

In summary, agriculture and food has a comparable multiplier effect at creating jobs in the overall economy with other key sectors. As a result, attracting investment in primary production agriculture can yield results that are competitive with investment in other sectors in the supply chain and other industries. Agriculture and food sector multiplier ratios are among the highest listed and the comparison with the greater economic region shows the result for York to be robust as the multipliers are higher in the broader region.

Table 19: Impact of adding 100 jobs to York Region's Agri-food Sector, 2011

NAICS	Sector	Change in Wages	Earnings Multiplier	Change in Jobs	Jobs Multiplier	Average Wages Per Job (2011)
1110	Farms	$6,734,708	2.75	199	1.99	$33,807
1150	Support Activities for farms	$11,831,634	1.44	185	1.85	$63,884
3112	Grain and oilseed milling	$12,160,743	2.3	279	2.79	$43,602
3114	Fruit and vegetable preserving and specialty food mfg.	$7,164,038	1.81	180	1.8	$39,697
4183	Agricultural supplies merchant wholesalers	$9,984,344	1.49	177	1.77	$56,493
2361	Residential building construction	15,291,662	2.91	324	3.24	$47,192
3363	Motor vehicle parts manufacturing	$9,065,597	1.31	144	1.44	$63,125
5415	Computer systems design and related services	$10,146,041	1.31	154	1.54	$65,918

Table 20: Impact of Adding 100 Jobs to the Sector in Greater Economic Region - Durham, York, Peel, Halton, Simcoe, 2011

NAICS	Industry	Change in Wages	Earnings Multiplier	Change in Jobs	Jobs Multiplier	Average Wages Per Job (2011)
1110	Farms	$10,097,416	3.87	269	2.69	$37,547
1150	Support Activities for farms	$11,313,169	1.72	210	2.1	$54,000
3112	Grain and oilseed milling	$13,029,545	2.2	267	2.67	$48,725
3114	Fruit and vegetable preserving and specialty food mfg.	$10,406,214	2.36	244	2.44	$42,695
4183	Agricultural supplies merchant wholesalers	$10,709,078	1.73	205	2.05	$52,281
2361	Residential building constructio n	19,510,585	4.11	432	4.32	$45,197
3363	Motor vehicle parts mfg.	9,263,577	1.62	176	1.76	$52,570
5415	Computer systems design and related services	$12,251,976	1.58	203	2.03	$60,490

6.7 Economic Impact Analysis Summary

Below is a summary of the key takeaways from the economic impact analysis of York Region's agri-food sector:

- The economic impact of primary production agriculture in York Region extends well beyond the $302 million of direct farm cash receipts in 2016. Total

economic impact of primary production, including indirect and induced economic activity, is over $552 million. This extends to:
    - $250 million in Gross Domestic Product (GDP)
    - 3578 jobs
    - $133 million in wages and salaries

- The 27 industries included in York Region's agri-food sector, from primary production to retail, account for 11 per cent of total employment in York Region. This number remains relatively consistent across most of the lower-tier municipalities.

- Most of the job growth in York Region's agri-food industry is at the consumer end – in food manufacturing as well as restaurant and grocery store workers – which correlates with the population growth in York Region.

- Within the agri-food sectors, the largest opportunity for better addressing regional requirements is primary production with, 71.9 per cent of $1.1 billion being imported from outside the economic region. The scale of the opportunity in Farms is of the same order of magnitude as the opportunities in Motor Vehicle Parts Manufacturing and Motor Vehicle Manufacturing. Unlike those sectors, however, the gains in Farms are incremental, can be sustained over time, and are not in direct competition with neighbouring jurisdictions. Meat Product Manufacturing and Beverage Manufacturing are other opportunities in York Region, but they are not good candidates for development as the need is being met by the Greater Economic Region.

- Agri-food has a relatively higher concentration in York Region the farther along the supply chain one goes from primary production agriculture.

- Notably, while farms are lower in concentration in the York Region Economy than the provincial economy, they were competitive over the 2006-2016 time frame.

- When a comparison is made between the Farms sector in York and surrounding upper-tier municipalities, Farms in York are remaining competitive both provincially and regionally. As well, the broader region is remaining competitive compared to the provincial level.

- According to our Input/Output analysis, attracting investment in primary production agriculture can yield results that are competitive with investment in other sectors in the supply chain and other industries.

- Certain sectors in the agri-food supply chain show relative strength within the Region's economy, and provide opportunities that, with support, could yield similar positive results for the regional economy to other industries and sectors. These sectors include the vegetable growing and processing sectors as well as grass-based livestock production.

7.0 York Region Agriculture and Agri-Food Strategy

7.1. The context informing the strategy

This strategy is meant to be a living and breathing document that evolves as York Region's agriculture and food sector changes. Consisting of five strategic goal areas and 47 recommended action items, this strategy has been informed by the stakeholder consultation findings, updated Census of Agriculture and economic impact analysis. This strategy is intended to cover the time period of September 2017 through to September 2022 (a five year period), however, it is fully expected that a number of these activities and actions will continue in to the future indefinitely in order to support the agriculture and agri-food sector in a long term and sustainable manner.

York Region's agri-food industry is a dynamic sector with unique opportunities and challenges. Based on the opportunities and barriers identified through the two phases of the research, stakeholder consultation and economic analysis, the strategy recommendations have been developed with the following factors in mind:

York Region – The Opportunities

- York's Region's location within the GTA provides access to a large, diverse market place and key transportation networks and creates a major advantage
- York Region has an existing food processing sector with significant infrastructure (cold storage, retail distribution centres, etc.)
- York Region has a productive land base accompanied by unique specialty crop areas (for example the Holland Marsh vegetable production area)
- York Region's agricultural land base, climate and producer capacity allow for a diversity of foods and agricultural products to be grown and processed in the Region
- There is an opportunity for strengthened communication and collaboration between the agri-food sector and the Region
- There is strong demand for locally sourced, healthy food in the Region and an opportunity for the agri-food sector to leverage this for increased growth (particularly for value-added)

York Region – The Barriers

- The primary agricultural production sector has a mixed outlook due to rapid urban growth in the Region and the rising cost of agricultural lands
- There are significant succession challenges in the Region and limited opportunities for new entrants; however, this could also present an opportunity

for York Region to develop innovative programs related to the number of small parcels of rental land available
- To ensure a viable agri-food sector, there is need to retain and add value to existing farm businesses
- There is a need to streamline regulations and policies aimed at attracting investment in the food processing sector

7.2 Strategic Goals

Five strategic goals emerged from the results of the stakeholder consultation and the economic analysis of the agri-food industry in York Region (see Figure 34). These goals are subsequently broken down in to objectives and action items in the following sections.

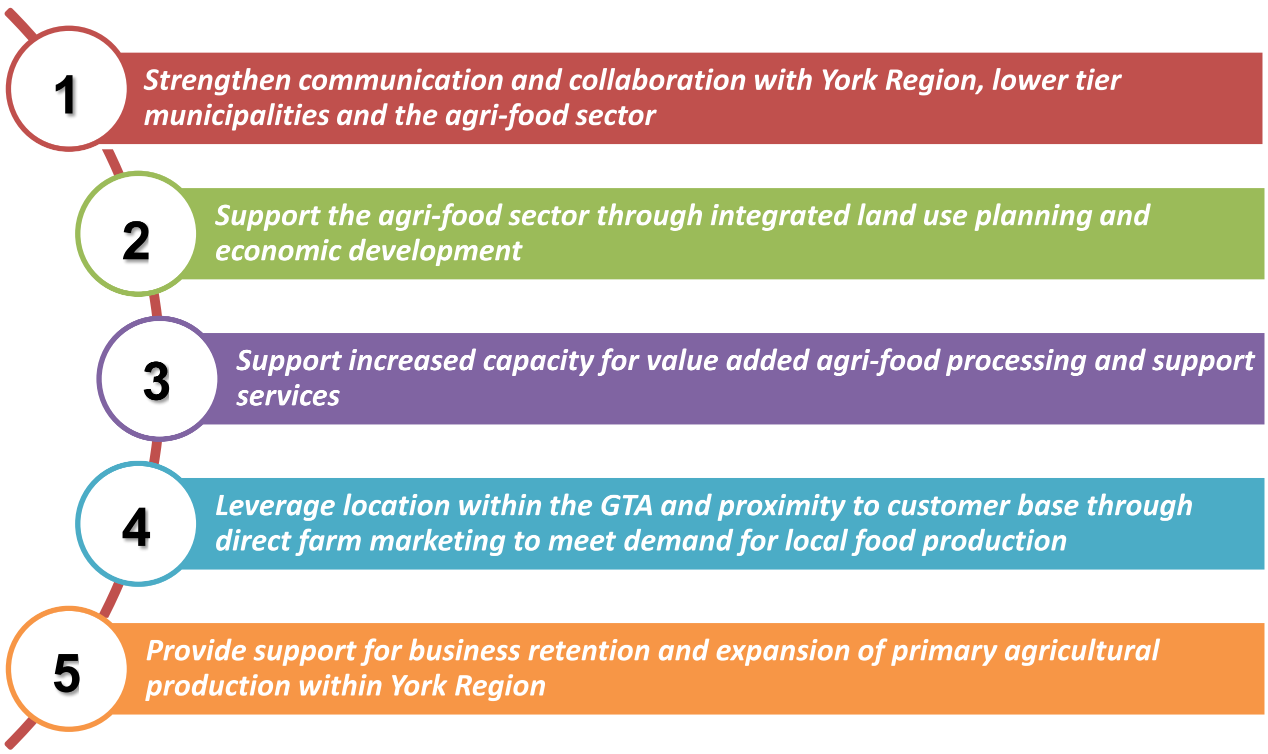

Figure 38: Strategic Goals for York Region's Agriculture and Agri-Food Sector

It is important to note that while leads for the action items and activities are identified, it is fully expected that community collaborators and external stakeholders will be engaged, and in some cases, will take on active leadership roles. As each action item is developed, there should be active consideration early on in the process to determine the full list of potential collaborators and organizational roles to ensure the strategy outcomes are met successfully.

The following figure is a user guide that will help readers understand the timeline, responsibility and performance metric(s) for each goal area.

Table 21: Strategic goal areas user guide

Action Item	Activity/Action	Timeline (Ongoing, S/M/L)	Lead Responsibility and Potential Partners or Collaborators	Performance Metrics or Outcomes
Action Number	Description of Recommended Activity or Action; may include examples	Short = 1 year Medium = 2-3 years Long = 4+ years	Identifies organizations, groups, or municipal governments, as the lead responsibility (or champion) for the activity or action. Note that this does not imply sole ownership of the activity. Potential Partners and/or collaborators are also identified	Where possible, performance metrics and outcomes are identified.

Strategic Goal #1: Strengthen communication and collaboration with York Region, lower tier municipalities and the agri-food sector

Objectives: *(i) Foster more communication between York Regional Council, staff, lower tier municipalities (including Councils and staff) and other organizations to enable collaboration, business growth and local food awareness*
(ii) Facilitate and support existing and emerging organizations and collaborations with municipal, provincial and industry organizations to deliver programming in an effective and cost-efficient manner.

Rationale: Through consultation with stakeholders across the Region, there is an opportunity for improved and strengthened communication and collaboration with and within the agri-food sector. Survey respondents, interviewees and open house attendees highlighted the need to improve Regional and Municipal staff's understanding of the sector in general, as well as the sector's challenges. For example, some farm businesses expressed frustration about the lack of consultation for development projects that directly impacted their business (e.g. road closures blocking field access at harvest time). Stakeholders also feel there is limited staff capacity at the Region with a strong understanding of agriculture and food production.

A key recommendation to meet this goal includes the development of an Agri-food Specialist role at the Region dedicated to supporting growth of existing agri-food businesses, attracting new investments and promoting the sector in York Region. Stakeholders highlighted this position requires someone with an agriculture background due to the diversity and complexity of the agriculture sector in York Region. Specific roles of the position should include:

- *Liaison:* acting as a liaison between the Agri-food sector businesses, associations and Regional Council and staff, as well as working with lower tier municipal economic development committees. In particular, this position would liaise between planning and economic development, and aid in the implementation of the strategy and provide leadership to YRAALG. This position would provide support to the various agricultural / agri-industry organizations, agencies and committees throughout York Region while also maintaining contact with local, provincial and federal ministries, agencies and organizations related to agriculture and agri-development.
- *Business Retention and Expansion:* Assist local businesses with food product innovation, local food programming, accessing funding programs and connecting with agri-food and agri-business programs
- *Investment Attraction:* actively market and promote York Region as a desirable location for agri-food businesses

Examples of regional municipalities with agricultural liaison/agri-food specialist positions include: Halton Region, City of Kawartha Lakes, Durham Region, Norfolk County, Grey County, City of Toronto, Municipality of Chatham-Kent, City of Sarnia-Lambton and Huron County. Appendix H includes a document from the Ontario Federation of Agriculture with several options of potential job descriptions for an agricultural liaison/coordinator position.

Several actions included in this strategy rely on building capacity at the Region to implement this strategy. An agri-food specialist role is an important step towards sustaining York Region's agri-food sector and will demonstrate a strong commitment to the sector.

York Region Agriculture and Agri-food Sector Strategy				
Strategic Goal #1	**Strengthen communication and collaboration with York Region, lower tier municipalities and the agri-food sector**			
Strategic Objectives	**i) Foster more communication between York Regional Council, staff, lower tier municipalities (including Councils and staff) and other organizations to enable collaboration, business growth and local food awareness** **ii) Facilitate and support existing and emerging organizations and collaborations with municipal, provincial and industry organizations to deliver programming in an effective and cost-efficient manner.**			
Action Item	**Activity/Action**	**Timeline (Ongoing, S/M/L)**	**Lead Responsibility and Potential Partners or Collaborators**	**Performance Metrics or Outcomes**
1.1	Create a York Region agri-food specialist role dedicated to supporting growth of existing businesses, attracting new investments and promoting the Agri-food sector in York Region. • This position requires someone with an educational background in agriculture due to the diversity and complexity of the agriculture sector in York Region • This role would liaise between economic development and planning, while investing time and leadership into YRAALG	Short **Next intake for RED is Sept. 29th, 2017**	York Region Planning and Economic Development Partners: OMAFRA (Rural Economic Development Program), South Lake Community Futures Development Corporation *Note: Appendix H provides a summary of job roles descriptions as examples.*	• Explore potential funding opportunities to create this position (E.g. Rural Economic Development Program and South Lake Community Futures Development Corporation funding application fo contract/new positions supporting economic development outcomes) • **Staff position created and filled by September 2018**
1.2	Build internal staff capacity at the Regional level to provide direction to lower tiers on agri-food issues; coordinate programming and initiatives between planning, economic development and tourism at the Regional level through an annual staff agri-food workshop (could include tours of local farms, processing plants, and guest speakers)	On-going	York Region Planning and Economic Development to lead and collaborate with all relevant departments	• Short pre and post workshop questionnaires distributed to all staff in attendance to measure level of knowledge and awareness

			Partners: Municipal councils and staff, and other relevant stakeholders such as Conservation Authorities, OMAFRA, etc.	
1.3	Develop a communication roadmap/strategy to ensure open and transparent communication pathways • Strengthen communication by developing and distributing a document/handout that helps connect agri-food stakeholder with the appropriate department/staff person if they have a question (e.g. Help understand Regional issue vs. municipal issue)	Short	York Region Planning and Economic Development Partners: YRAALG, York Federation of Agriculture, lower tier municipalities	• Communication strategy is developed by July 2018 • Resource materials (documents/handouts) are prepared and made available by October 2018
1.4	Create a directory/resource that includes names and contact information of producers in the Region; to be used by the Region for collecting employment data, information, etc.	Meduim	York Region Planning and Economic Development Partners: YRAALG, York Federation of Agriculture	• Directory is created by November 2018
1.5	Create annual opportunity to collect feedback from the agri-food sector to strengthen York Region staff and Council's understanding of farm and food businesses and their needs by engaging with local famers and agri-food experts • Through open house consultation, work with agri-food sector to identify aspects of public infrastructure supportive of the agri-food sector (e.g. roads, drainage, broadband connectivity) requiring attention • Ensure meetings/open houses are held at a time that is convenient and accessible for primary producers	Ongoing	York Region Planning and Economic Development Partners: YRAALG, York Federation of Agriculture	• Ensure targeted communication with agri-food stakeholders in public meeting notices • Create and distribute an annual survey regarding the sector's needs related to business retention and expansion
1.6	Continue to support and collaborate with the Golden Horseshoe Food and Farming Alliance through projects	Ongoing	York Region Planning and Economic Development	• York Region continues to have

	and update inventory of agri-food assets and resources in York Region including agri-tourism, livestock, equine, etc.		Partners: York Federation of Agriculture	representation at GHFFA (both elected officials and staff representation at working group meetings) • One collaborative project per year is supported by York Region
1.7	Continue support for the York Region Agricultural Advisory Liaison Group (YRAALG) by allocating annual budget for special projects and events • Develop standard practices to collect feedback on issues prior to reports being drafted • Develop advisory memos that outline issues and feedback required with clear timelines • Refer agri-food related issues to the advisory group for feedback	Medium	York Region Planning and Economic Development Partners: YRAALG	• Allocate staff time (ideally new Ag Liaison position) • Develop clear terms of reference for YRAALG • Provide sufficient annual budget for projects and events • Provide annual report to Council
1.8	Explore and identify ways to celebrate and showcase agricultural innovators/champions in the Region using existing communication efforts • Consider using existing communication efforts such as online newsletters and social media to share videos/photos/blogs about agriculture in York Region • Build support and understanding for the agri-food sector by showcasing best practices used by local producers (e.g.	Ongoing	York Region Planning and Economic Development, lower tier economic development staff Partners: YRAALG, York Federation of Agriculture, York Region Food Network	• Ensure the inclusion of 4-6 agri-food success stories per year in York Region communications • Ensure 2-4 agri-food success stories in all lower tier municipality communications

	minimizing impacts on the environment through sustainability innovations)			
1.9	Seek opportunities to collaborate with partners in York Region and beyond the Region • E.g. Facilitate networking sessions for local producers and restaurant/hospitality stakeholders in the Region/GTA (a "dating service")	Ongoing	Partners: Local Chambers, business associations, VentureLab, Clearwater Farms, Community Futures Ontario, the Agri-Food Management Institute, Friends of the Greenbelt Foundation, Parks Canada/Rouge National Urban Park, Muck Crops Research, Ontario Fresh, Friends of the Greenbelt Foundation, OMAFRA Station, Holland Marsh Growers' Association, Foodland Ontario, Golden Horseshoe Food & Farming Alliance	• Identify one new collaborative opportunity per year • Support the ongoing development of collaborative projects • Showcase these projects at an **Annual York Agri-Food Day**
1.10	Develop York Region agri-food educational materials for general public to share at regional and community events (e.g. Fall Fairs). • Include accessible data such as contribution of the Region's agri-food sector and case studies of innovative operations in the Region	Ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff, Communications staff	• Meet with communications staff and brainstorm potential opportunities to share materials (website) • Develop York Agri-Food Factsheet(s)
1.11	Investigate and explore opportunities for teaching youth about agriculture and food production in the Region • E.g. Agriculture in the Classroom	Medium	YRAALG, York Federation of Agriculture and commodity groups Partners: Local school bard, Agriculture in the Classroom, AgScape	• One new "ag in the classroom" event per year

1.12	Demonstrate a commitment to the agri-food sector by supporting agricultural events and conventions through	Ongoing	York Region Planning and Economic Development Partners: York Federation of Agriculture, commodity groups (Beef Farmers of Ontario, Dairy Farmers of Ontario, etc.)	• Include budget item in YRAALG terms of reference to support 1-3 agri-food events per year across the Region
1.13	Collaborate with organizations such as Rouge National Park, Oak Ridges Moraine Trust, Ontario Soil and Crop Improvement Association (OSCIA), and Ontario Farmland Trust to conduct study to understand current land stewardship practices used by York producers. • E.g. Environmental Farm Plan, Species at Risk Farm Incentive Program	Medium	York Region Planning and Economic Development, Lower tier planning and sustainability staff Partners: Oak Ridges Moraine Trust, Ontario Farmland Trust, Ontario Soil and Crop Improvement Association	• Conduct study and complete assessment of farmland management tools by 2020

Strategic Goal #2: Support the agri-food sector through integrated land use planning and economic development

Objective: *Encourage regional and municipal land use policies, development fees & approval processes to align with updated provincial policy and support York Region's agri-food sector now and in the future*

Rationale: With the recent release of the four updated Provincial Plans and OMAFRA's draft document on *Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe,* it is timely for York Region to review their planning and economic development policies related to the agri-food sector. A key difference in the updated plans is the inclusion of the *agricultural system* (as discussed above in section three of this report). An *agricultural system* approach recognizes that farmland (including prime agricultural land, rural lands and specialty crop areas) and clusters of agri-food infrastructure and services need to co-exist along rapidly growing communities and infrastructure.[69] Appendix F of this report includes a list of changes suggested in the

[69] OMAFRA, 2017. *Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe.*

Agricultural System draft report mentioned above. All of their suggested changes should be considered by the Region in order to support a thriving agricultural sector.

Overall, an integrated approach to land use planning and economic development in York Region that recognizes the importance of the agri-food system's complex network is needed to ensure agriculture and food production remain viable in the Region. The Region should explore and identify avenues for helping land owners and stakeholders understand what these changes mean and how they have been interpreted by planning and economic development staff.

York Region Agriculture and Agri-food Sector Strategy				
Strategic Goal #2	**Support the agri-food sector through integrated land use planning and economic development**			
Strategic Objective	**Encourage regional and municipal land use policies, development fees and approval processes to align with updated provincial policy and support York Region's agri-food sector now and in the future**			
Action Item	**Activity/Action**	**Timeline (Ongoing, S/M/L)**	**Lead Responsibility and Potential Partners or Collaborators**	**Performance Metrics or Outcomes**
2.1	At next review, update York Region's Official Plan to conform and align with recent changes to the *Greenbelt Plan, Growth Plan* and *Oak Ridges Moraine Plan* (2017 updates) • Work with lower tier municipalities as they review and update processes • *A full list of changes to consider is included in Appendix F of this report*	Medium	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: OMAFRA, MMAH, GHFFA, YRAALG	• Update official plans to reflect current provincial policies

2.2	Prior to next Official Plan review, reexamine Land Evaluation and Area Review (LEAR) study and determine if updates are needed to reflect changes at the provincial level (agricultural system mapping)	Medium	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: OMAFRA	• Updated agricultural and rural mapping in the Regional Official Plan
2.3	Through the Municipal Comprehensive Review, review York Region's Official Plan (and lower tier plans) agricultural and rural policies to ensure they encourage and support investment and employment in the agriculture sector	Ongoing	York Region Planning and Economic Development, YRAALG, lower tier economic development and planning staff	• Updated and relevant agricultural and rural policies which encourage and support investment and employment in the agriculture and agri-food sector
2.4	Conduct a study that investigates innovative financial mechanisms that incentivize producers and land owners to keep land in agricultural production • Suggestions from consultation include: reduced development charges; reduced farmland tax rates; and a land speculation tax to increase the tax rate for foreign buyers • Identify ways to further incentivize landowners to provide long-term leases to farmers	Medium	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: Ontario Farmland Trust	• Conduct study in 2018 for implementation in 2019 • Identify potential financial incentives for landowners that encourage farmland production and long-term protection • Communicate the importance of long-term leases to non-farm landowners
2.5	Conduct a review of policies and regulations related to environmental performance of food processing operations within the Region • Streamline process and explore incentives and subsidy programs	Short	York Region Planning and Economic Development and other appopriate departments related to environmental management.	• High priority action item; conduct study in 2018 for implementation in 2019 • Outcome would be creating an 'open for business' environment for the food processing and manufacturing sector in York as these companies transition

	to assist companies as they transition to clean technologies			to environmentally sustainable practices and technologies
2.6	Participate in the upcoming consultation and review for the Greater Golden Horseshoe's *Agricultural System* policies (led by OMAFRA) which *recognizes farmland and clusters of agri-food infrastructure and services need to co-exist alongside rapidly-growing communities and infrastructure*	Short	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: OMAFRA, YRAALG, York Federation of Agriculture, Holland Marsh Growers' Association	• Continue to participate in review and work with lower tier planning and economic development staff and stakeholders to draft feedback/recommendations for the adoption of an *agricultural system* approach in the Golden Horseshoe • YRAALG and lower tier municipal staff to provide input on agricultural system policies through Municipal Comprehensive Review
2.7	Recognize and acknowledge the agri-food sector's role as an economic driver in the Region through updates to plans and policies, such as York Region's *Economic Development Action Plan*	Medium	York Region Planning and Economic Development	• Update relevant documents to further recognize agri-food sector as an economic driver in the Region
2.8	Conduct a study and review of edge planning practices and identify planning tools the Region can use to minimize conflicts between adjacent urban and agricultural land uses	Medium	Partners: GHFFA, YRAALG, neighbouring municipalities (share best practices)	• York Region will position itself as a leader in Ontario and Canada in edge planning with the Region's unique rural-urban interface
2.9	Monitor the province's development of *Agricultural Impact Assessment* (AIA) guidelines and provide feedback through consultation with planning staff, YRAALG and other relevant stakeholders	Ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff	• York Region Planning and Economic Development staff to provide staff and YRAALG feedback to the Province on AIA guidelines as they are being developed

			Partners: OMAFRA, GHFFA, YRAALG, York Federation of Agriculture, Holland Marsh Growers' Association	
2.10	Encourage local municipalities to develop and implement an Agricultural Community Improvement Plan (CIP) to incentivize on-farm diversification and value-added operations.	Ongoing	Lower tier economic development and planning staff Partners: York Region Planning and Economic Development, Business Improvement Areas, Chambers of Commerce	• Review examples (e.g. Elgin County, Niagara Region, Haldimand County and Norfolk County) of CIP's and identify opportunities for York Region to develop programs, grants and loans to support agricultural growth and long-term sustainability • York Region to provide support and guidance to lower tier municipalities as they undertake CIPs
2.11	Create factsheets and accessible materials to help agri-food stakeholders interpret land use policies • Based on stakeholder feedback, potential topics could include: Farming in the Greenbelt; Interpreting Permitted Uses in Provincially protected areas (Greenbelt, Oak Ridges Moraine)	Ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff	• Create and distribute 3-5 factsheets by 2020

Strategic Goal #3: Support increased capacity for value added agri-food processing and support services

Objective: *Connect local producers with value added and processing opportunities while attracting new investment to York Region.*

Rationale: York Region has a strong food processing sector, with high competitiveness in fruit and vegetable processing, bakery and tortilla manufacturing, and beverage manufacturing. Paired with the presence of high vegetable production (from the Holland Marsh), there is a unique opportunity for the Region to support and leverage value added processing and support services. Connecting local producers with value-added and processing opportunities within the Region is a unique opportunity that should be leveraged. Supporting the agri-food sector through support services and programs will help leverage existing companies while attracting future investment.

York Region Agriculture and Agri-food Sector Strategy				
Strategic Goal #3	**Support increased capacity for value added agri-food processing and support services**			
Strategic Objective	**Connect local producers with value added and processing opportunities, while attracing new investment to York Region**			
Action Item	**Activity/Action**	**Timeline (Ongoing, S/M/L)**	**Lead Responsibility and Potential Partners or Collaborators**	**Performance Metrics or Outcomes**

3.1	Develop and implement a Food Processing Action Plan that demonstrates York Region is 'open for business' to attract and retain food processing businesses • Sub-sectors to target for continued growth include: bakery and tortilla manufacturing; fruit and vegetable processing; and the beverage sector	Medium	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: Food processing stakeholders, OMAFRA Business and Development Branch	• Complete study identified in Action Item 2.5 • Actively seek out 1-2 new food processing plants per year starting in 2018
3.2	Establish an agri-entrepreneur mentor program in conjunction with the York Small Business Enterprise Centre to support existing and potential entrepreneurs with mentoring and business guidance	Medium and ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: York Small Business Enterprise Centre, VentureLAB, OMAFRA, South Lake Community Futures Development Corporation	• Mentorship program is established by January 2019 • Target 2-4 new agri-food enterprises per year
3.3	Investigate and identify opportunities to develop a regional food incubator/hub to support fruit and vegetable value-adding opportunities to increase farm revenue • Services could include washing, cutting, quick chill, flash freeze, labelling, cold/frozen/dry storage, packaging while providing a space for training and development (including a commercial kitchen • Identify funding opportunities (Friends of the Greenbelt Foundation; Trillium Foundation, etc.) • E.g. Ontario Agri-Food Venture Centre in Northumberland County	Long	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: OMAFRA, funding partners, The Link (Sutton), Holland Marsh Growers' Association, South Lake Community Futures Development Corporation, VentureLab	• Include this as an action item for YRAALG • Create sub-committee to investigate opportunities • Report and action plan by January 1, 2020

Strategic Goal #4: Leverage proximity to GTA through direct farm marketing and meet demand for local food production.

Objective: *Strengthen direct farm marketing and local food opportunities*

Rationale: A key strength of York Region's agri-food sector is the proximity to the large consumer base found in the GTA. While 17 per cent of York Region farmers already use direct farm marketing (e.g. farm gate, kiosks, farmers' markets, etc.), there is significant room for growth as there is a large urban population with a growing interest in local food production. In order to take advantage of this, the Region should explore and identify ways to support the entire value chain in accessing this market. With the revitalization of the York Farm Fresh Organization and the strong demand for local food in the Region, it is timely to implement actions that support direct farm marketing and local food production. There are several existing organizations/initiatives in the GTA focused on direct farm marketing that can be leveraged.

York Region Agriculture and Agri-food Sector Strategy				
Strategic Goal #4	**Strengthen direct farm marketing and local food opportunities**			
Strategic Objective	**Leverage proximity to GTA through direct farm marketing and meet demand for local food production.**			
Action Item	**Activity/Action**	**Timeline (Ongoing, S/M/L)**	**Lead Responsibility and Potential Partners or Collaborators**	**Performance Metrics or Outcomes**
4.1	Facilitate the formation of the York Farm Fresh Organization to support the growth of York's agri-food sector and demand for farm-direct production. Particular efforts to support include: - Guiding the organization through the development of directional signage	Ongoing	York Region Planning and Economic Development and York Farm Fresh	• Marketing and signage campaign completed and implemented by May 1st, 2020 • Online platform created by May 1st, 2020

	- Facilitate the development of an online platform that consumers can use to find local farms/products (an interactive map)			
4.2	Continue annual production of the York Region Farm Fresh Guide Map and initiatives like the Pumpkin Pie Trail Map to promote and raise awareness of locally produced agricultural products - Release the Farm Fresh Guide map and Pumpkin Pie Trail Map in additional languages to reflect the Region's diversity and attract larger numbers - Release the maps by April 15th each year	Short	York Region Planning and Economic Development Partners: Lower tier municipalities, YRAALG, York Farm Fresh	• Develop one new language version per year starting in 2018 with a goal of 5 new language versions by 2022 • Maps are distributed by April 15th each year
4.3	As encouraged in the Regional Official Plan, continue to support the provision of community gardens and/or urban agriculture projects that promote agricultural awareness in settlement/urban areas through educational programs/initiatives - Identify ways to synergize community gardens and the food incubator/hub (Action 3.4) if successfully implemented	Ongoing	York Region Planning and Economic Development and Lower tier municipalities Partners: York Region Food Network	• Develop best practices guide for community gardens in York Region
4.4	Support the development of agri-tourism programming such as "Farm Tour Hikes" (an organized, self-guided farm tour in cooperation with local farm organizations)	Ongoing	York Region Planning and Economic Development, YRAALG, commodity organizations Partners: Central Counties, Lower tier municipalities, Rouge National Urban Park, York Farm Fresh, York Region Food Network	• YRAALG to identify agri-tourism opportunities in the Region • Support the development and promotion of an annual York Farm Tour Hike through social media networks
4.5	Raise awareness around the diversity of production and procesing found in the Region through promotional	Ongoing	York Region Planning and Economic Development	• Include as a key objective

	materials (e.g. Ontario's 'soup and salad bowl' in the Holland Marsh; world crop production)		Partners: York Region Food Network, Holland Marsh Growers' Association, FoodLand Ontario	of the annual **York Agri-Food Day** program (Action 1.10) • Strengthen social media presence
4.6	Revisit York Region's Food Charter and broaden support across the agri-food sector	Ongoing	York Region Community and Health Services Department, with support from Regional and lower-tier Council (endorsments and support), York Region Food Network Partners: YRAALG, York Region Planning and Economic Development, Friends of the Greenbelt Foundation, York Federation of Agriculture	• Conduct review and update of the Food Charter • Marketing and promotion campaign for the Charter across the Region • Promote the updated food charter through social media
4.7	Develop local food-sourcing policies for Regional facilitites and encourage other public sector agencies within the Region to adopt similar policies	Medium	York Region Planning and Economic Development, with support from Regional and lower-tier Council (endorsments and support) Partners: York Region Food Network, YRAALG, York Region Community and Health Services Department, Friends of the Greenbelt Foundation, York Federation of Agriculture	• Create best practices document for local food sourcing policies
4.8	Facilitate relationship building between producer, processors and retail companies that support local food	Medium	York Region Planning and Economic Development	• Include networking

	production (e.g. Longos, Metro) through networking events		Partners: OMAFRA, Foodland Ontario, VentureLAB	event as part of the first annual York Agri-Food Day • Ongoing liaison role for York agri-food specialist position
4.9	Communicate and promote exisiting online tools to help connect producers with the local market through workshops and seminars. Examples of existing programs include: - Ontario Fresh is an online network and marketing service designed to help Ontario businesses buy and sell more food - Farm to City links farmers to customers seeking locally-produced beef	Medium	York Region Planning and Economic Development Partners: York Region Food Network, YRAALG, Friends of the Greenbelt Foundation, York Federation of Agriculture, Golden Horseshoe Food and Farming Alliance	• Include as action item for York agri-food agri-food specialist role • Goal to involve York Region producers in one of these programs by January 1st 2020
4.10	Partner with **Rouge National Urban Park** and **Toronto and Region Conservation Authority** to increase collaboration and learning amongst new entrants in to the agri-food sector and with agri-tourism businesses and potential new entrants into agri-tourism through hikes, education programs and/or peer-to-peer learning groups	Medium	York Region Planning and Economic Development Partners: Rouge National Urban Park, Toronto and Region Conservation	• Convene meeting with relevant staff to develop potential collaborations

Strategic Goal #5: Provide support for business retention and expansion of primary agriculture production within York Region

Objective: *Support existing agricultural operations in the Region by leveraging opportunities for value-added production and/or expansion.*

Rationale: As highlighted by stakeholders across the Region, a thriving agri-food sector requires more than a secure land base. Retaining existing businesses and attracting further investment through value added production and expansion require sustainability of assets and infrastructure across the value chain. With the high level of vegetable production in the Region, several stakeholders voiced concern about a viable labour base. Other stakeholders with an interest in direct farm marketing would like to see more investment in value added agri-tourism opportunities.

York Region Agriculture and Agri-food Sector Strategy				
Strategic Objective	**Strategy #5: Provide support for business retention and expansion of primary agriculture production within York Region**			
Strategic Goals	**Support existing agricultural operations in the Region by leveraging opportunities for value-added production and/or expansion.**			
Action Item	**Activity/Action**	**Timeline (Ongoing, S/M/L)**	**Lead Responsibility and Potential Partners or Collaborators**	**Performance Metrics or Outcomes**
5.1	Conduct Agriculture and Agri-Food Retention and Expansion studies (supported by OMAFRA) to assess and evaluate the needs and opportunities in each lower-tier municipality	Medium	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: OMAFRA, Rural Economic Development (RED) Program Staff, South Lake Community Futures Development Corporation, OFA, Food processing sectore	• Study is completed by December 2019

5.2	Conduct a study and develop a long-term sustainability strategy for the Holland Marsh through collaboration with stakeholders and partners (e.g. Simcoe County, Lake Simcoe Regional Conservation Authority, Holland Marsh Growers' Association, OMAFRA, etc.)	Medium	Partners: Simcoe County, Lake Simcoe Regional Conservation Authority, Holland Marsh Growers' Association, OMAFRA	• Conduct a thorough review of the future trends and issues impacting the Holland Marsh • Develop a sustainability strategy specific to the unique land base (muck soils) found in the Holland Marsh • Identify actions to support the long-term viability of this specialty crop area and significant economic driver for the Region and province • Create educational materials and a knowledge translation and transfer strategy to encourage adoption of sustainable best practices in the Marsh
5.3	Continue to work with industry and government agencies to support the employment of seasonal and foreign agricultural workers, with respect to working conditions, accommodations, cultural services and accessibility to workers	Ongoing	York Region Community and Health Services Department Partners: Service Canada, Foreign Agricultural Resource Management Services (FARMS), Ministry of Labour, OMAFRA, Ontario Fruit and Vegetable Growers' Association, Holland Marsh Growers' Association	• Continue to work with representatives from Service Canada and Foreign Agricultural Resource Management Services (FARMS) to ensure best practices are being followed in York Region (e.g. Housing)

5.4	Undertake an equine industry study and consultation to identify barriers and opportunities for growing the Region's equine industry including research on successes in other regions (e.g. Greater Toronto Area, Caledon, Halton Hills, etc.)	Medium	Lower-tiers with significant equine sector (e.g. King Township) with support from Region Partners include: Headwaters Tourism	• Complete study and identify opportunities for supporting this sub-sector in York Region by January 1st, 2020
5.5	Explore opportunities to increase the production of world crops within York Region	Short and ongoing	York Region Planning and Economic Development Partners: Muck Crop Research Station (U of Guelph), Vineland Research and Innovation Centre, Holland Marsh Growers Association, York Region Federation of Agriculture	• Host facilitated session with relevant stakeholders to explore opportunities for world crops • Engage keynote speakers to provide comprehensive overview of the opportunities
5.6	Continue support to improve broadband connectivity across the Region through the Region's Broadband Strategy; particularly in rural and agricultural areas to help businesses develop and grow	Ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff	• Achieve targets as currently being set out by the York Broadband Strategy Committee
5.7	Develop template and prepare annual report card to record and evaluate achievements - Develop indicators and measures of success for the agri-food sector to track the overall health of the sector and identify appropriate adjustments	Ongoing	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: YRAALG, OMAFRA	• Annaul report card prepared and distributed
5.8	Conduct a five-year review of York Region's Agriculture and Agri-Food Sector Strategy	Long	York Region Planning and Economic Development, lower tier economic development and planning staff Partners: YRAALG	• Conduct review by December 31st 2022

Appendices

Appendix A: York Region Map

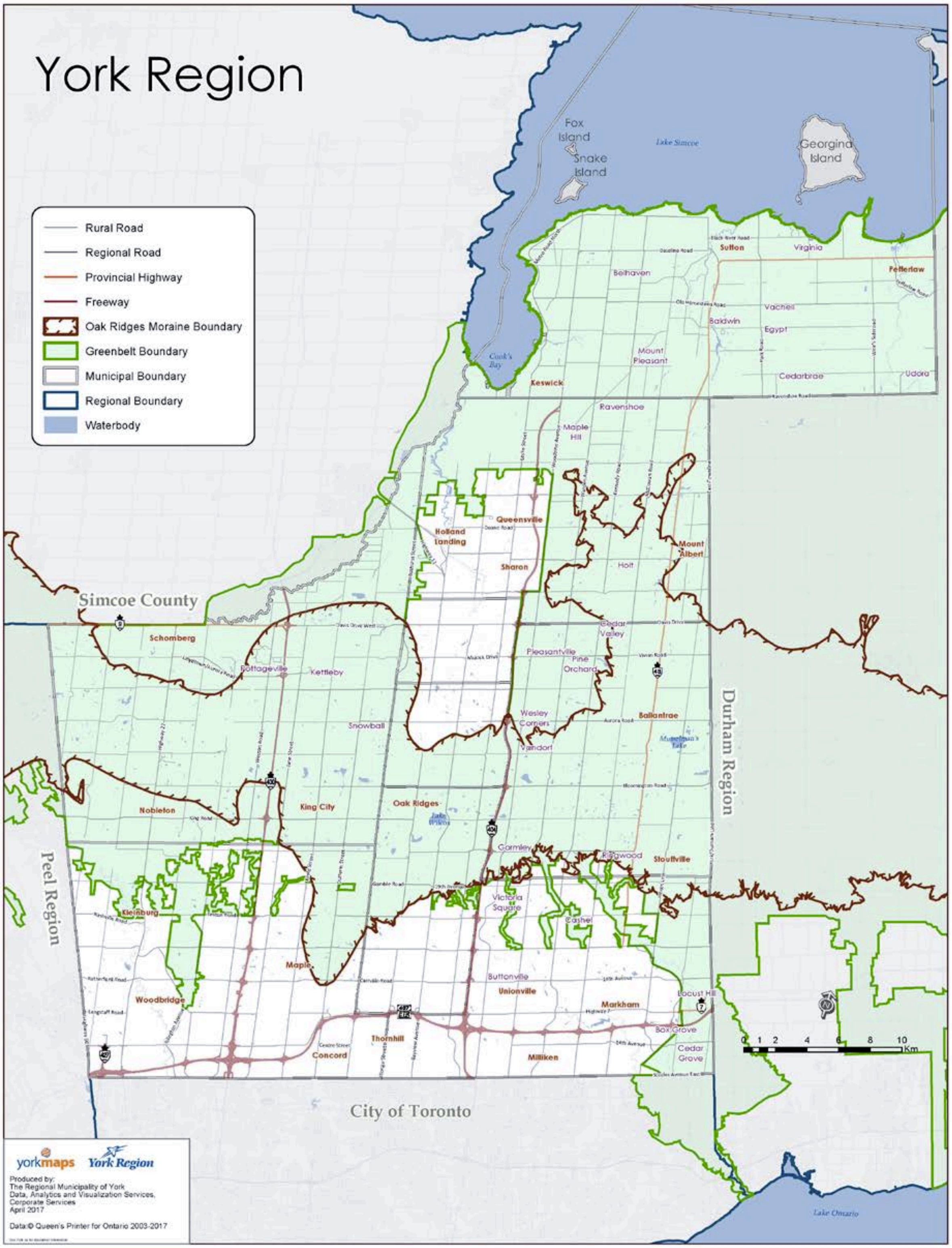

Figure 39: York Region Map

Appendix B: Food and Farming Asset Strategy Summary

Table 22: Analysis of Food and Farming Assets in the Golden Horseshoe

Grow The Cluster – Increase agri-food production, investment and employment on a shrinking land base in a sustainable manner				
Strategy	**Sector Focus**	**Enablers & Inhibitors**		**Recommendations and Requirements**
1. Increase further processing capacity through business retention and investment attraction	Grain/Milling/Bakery Meat Sugar/Confectionary Fruit and Vegetable Beverage	Food Trends Proximity to Consumers Canadian Dollar Workforce	Energy Prices Transportation Gentrification Regulations (Municipal and Provincial)	Conduct feasibility study on increasing capacity for further processing (e.g. IQF) Identify "at-risk" sub-sectors and develop strategies for business retention. **Requirements**: Efficient transportation (water, rail, truck) Competitive energy costs Reduced / coordinated regulations
2. Increase average production value per acre with high value crops	Fruit and vegetable production (fresh and processing market) Greenhouse vegetables World vegetables (field or greenhouse) Nursery, tree and ornamentals (for landscaping)	Food Trends Climate Change Micro-climates Water Workforce	Access to Water (for irrigation) Transportation Gentrification Market Risks	Investigate feasibility to increase processing capacity (e.g. IQF, slicing, packaging) Greenhouse vegetable production market assessment New markets education program **Requirements:** Access to water for irrigation Local food demand creation
3. Further develop on-farm value added and farm direct sales by creating demand for local food	Local food Value added / gourmet products Equine (and support services)	Proximity to Consumers Food Trends Climate Change	Market Risks Regulations (Municipal and Provincial)	Increase consumer awareness and education Market local food opportunities New markets education program Equine sector development plan **Requirements:** Local food demand creation

Source: Synthesis Agri-Food Network, 2015. Analysis of Food and Farming Assets in the Golden Horseshoe.

Appendix C: Online Survey and Discussion Guide

Online Survey

York Region Agriculture & Agri-Food Strategy

Introduction: York Agriculture & Agri-Food Sector Strategy

The Regional Municipality of York, with the support of the York Region Agricultural Advisory Liaison Group, is developing an agriculture and agri-food strategy to provide direction for the long-term growth of the agricultural and food production sector in York Region.

By gaining an understanding of the economic impact of the sector, and by identifying sub-sectors with significant potential, this strategy will enhance the Region's capacity to further support the growth of the agriculture and agri-food sector.

As part of this process, we are contacting agriculture and food producers, consumers, businesses and organizations to gather insights into the opportunities and barriers for the agri-food sector. Please complete the following brief survey. The survey should take approximately 10 minutes to complete. Your responses are confidential, and the feedback collected will only be reported in summary format, not individually attributed.

Thank you for your help in strengthening the agriculture and food sector in York Region! The information you provide will assist in identifying opportunities and barriers that will be analyzed for the sector strategy.

York Region Agriculture & Agri-Food Strategy

York Region Agriculture & Agri-Food Survey

1. What group are you part of / do you represent in York Region? Please check all that apply.

- [ ] Primary agricultural producer (farmer)
- [ ] Agri-related services or support sector (i.e. feed, equipment, vet, agri-chemical, distributor, wholesale)
- [ ] Food processor
- [ ] Restaurant, caterer, food service provider
- [ ] Food retail
- [ ] Agricultural and/or food organization
- [ ] Government
- [ ] Not-for-profit located in and/or serving York Region
- [ ] Consumer/resident of York Region

Other (please specify)

2. What type(s) of food or non-food product(s) do you produce?

3. In what Municipality are you located?

4. What type(s) of food / processing do you do?

5. In your opinion, what are the strengths of the agriculture and food sector in York Region?

6. Please rate the following trends / issues based on how much they **support** York Region's agriculture and food sector?

	1 Least impact	2	3 Moderate impact	4	5 Significant impact
Access to large, urban market					
Access to transport options for goods					
Access to food processing					
Access to farm supply/service sector businesses					
Access to labour					
Access to land					
Broadband internet access					
Unique and high quality agricultural land					
Consumer interest in local food and niche/specialty markets					
Agri-tourism opportunities					
Value added and other on-farm diversified uses					
Proximity to innovation and technology companies					
Policies that protect agricultural land					
Support from Municipal/Regional/Provincial Government/Staff					
Climate change					

Please explain your answers above in more detail and add any trends or issues that are missing from the list:

7. Please rate the following trends / issues based on how much they **limit** York Region's agriculture and food sector?

	1 Least impact	2	3 Moderate impact	4	5 Significant impact
Access to land	○	○	○	○	○
Access to labour	○	○	○	○	○
Lack of new entrants into sector	○	○	○	○	○
Lack of government support (local/regional/provincial) for agriculture and food sector	○	○	○	○	○
Restrictive land use policies	○	○	○	○	○
Market uncertainty	○	○	○	○	○
High cost of inputs for operation	○	○	○	○	○
Urbanization	○	○	○	○	○
Overabundance of rented farmland	○	○	○	○	○
Lack of communication between producers and consumers	○	○	○	○	○
Lack of collaboration among agricultural and food groups	○	○	○	○	○
Climate change	○	○	○	○	○
Rules and regulations (i.e. food safety)	○	○	○	○	○
Challenges with entering new/larger markets	○	○	○	○	○

Please explain your answers above in more detail and add any trends or issues that are missing from the list:

8. In your opinion, what is the outlook for economic growth of the **overall** agriculture and agri-food sector in York Region?

Significant decline	Moderate decline	Stable outlook	Moderate growth potential	Significant growth potential
○	○	○	○	○

9. In your opinion, what is the outlook for economic growth of the **primary production** segment of the agriculture and agri-food sector in York Region?

Significant decline	Moderate decline	Stable outlook	Moderate growth potential	Significant growth potential
○	○	○	○	○

10. In your opinion, what is the outlook for economic growth of the **food processing** segment of the agriculture and agri-food sector in York Region?

Significant decline	Moderate decline	Stable outlook	Moderate growth potential	Significant growth potential
○	○	○	○	○

11. In your opinion, what is the outlook for economic growth of the **restaurant/retail/food service provider** segment of the agriculture and agri-food sector in York Region?

Significant decline	Moderate decline	Stable outlook	Moderate growth potential	Significant growth potential
○	○	○	○	○

12. What are the opportunities for growth that you see for the agriculture and food sector in York Region? Please rate each of the following opportunities on a scale of 1 (least impact) to 5 (significant impact).

	1 Least impact	2	3 Moderate Impact	4	5 Significant impact
Proximity to large, urban centres	◯	◯	◯	◯	◯
Proximity to innovation centres with new and emerging technology capacity	◯	◯	◯	◯	◯
Changing demographics in the Region (example: Opportunity to grow world crops)	◯	◯	◯	◯	◯
Agri-tourism / culinary tourism	◯	◯	◯	◯	◯
Develop staff capacity to support agriculture and food sector	◯	◯	◯	◯	◯
Improving Regional policies to support innovation and sustainability in the sector	◯	◯	◯	◯	◯

Please explain your answers above in more detail and add any opportunities that are missing from the list:

13. Do you have any other feedback or advice in developing this strategy?

14. Would you like to receive an electronic copy of the York Region Agriculture and Agri-Food Strategy when it is completed?

◯ Yes

◯ No

If yes, please provide your email address below. (It will not be attributed in any way to your answers).

Key Informant Interview Discussion Guide

[Introduction – myself, purpose of the call, overview of the project]
Ex: Synthesis Agri-Food Network is developing an Agriculture and Agri-Food Sector Strategy for the Region of York. As part of this process, we are contacting several agriculture and food businesses and organizations to gather insights into the opportunities and barriers for the agri-food sector.

[Purpose of the interview]
We would like to discuss the economic contribution of the agriculture sector, identify areas of opportunity and establish strategic priorities for the retention, expansion and attraction of agriculture investment in York Region.

[Confirm this is a good time to talk. Call is estimated to be 20-30 minutes]

[Confidentiality]
Mention that this interview will be confidential, feedback and insights gathered will only be reported in summary format. We will not attribute your comments back to you individually.

<u>Discussion Questions</u>

1. In your opinion, what are the strengths of the agriculture and food sector in York Region? (Please list)

2. What are the opportunities for growth that you see for the agriculture and food sector in York Region?

    a. Do you have any particular ideas that could boost the sector or create more business? Please expand.

3. What do you perceive to be the barriers in York Region to growing output in the agriculture and food sector (e.g. increased production, greater employment, increased manufacturing, etc.)?

4. During this process, we have developed a few themes and ideas which we are investigating; we would like your feedback on these:

    a. The York Region is geographically part of the GTA. What opportunities for the agri-food sector are present due to the close proximity to the GTA?
        i. From your perspective, how important is it to pursue this opportunity *(Not at all important to Very important, with option for No opinion)*

    b. York Region is located in close proximity to innovation and technology hubs such as Vaughan and Markham. What opportunities do you think this creates?

i. From your perspective, how important is it to pursue this opportunity *(Not at all important to Very important, with option for No opinion)*

c. *[If not already discussed in opportunities relating to proximity to the GTA]* Agri-tourism is a trend that is popular in certain parts of Ontario. Do you think this is an opportunity for York Region?

    i. From your perspective, how important is it to pursue this opportunity *(Not at all important to Very important, with option for No opinion)*

5. Are there any trends or factors that will affect the agriculture and food sector in York Region in the next 5 years?

6. Do you have any other feedback or advice for us in developing this strategy?

[Mention Open House and invite them to attend if interested]
Open House – March 27th in Sharon (East Gwillimbury)
Session 1: 1:30 – 3:30
Session 2: 8:00 – 10:00

[Thank them for their time and close]

Appendix D: Additional Stakeholder Consultation Results

Survey Respondents Background Information

A majority of survey respondents categorized themselves as ‘primary agricultural producer (farmer)’ (59 per cent) and ‘consumer/resident of York Region’ (33 per cent). 12 per cent identified as ‘restaurant/caterer/food service provider’ and 10 per cent identified as agricultural and/or food organization.

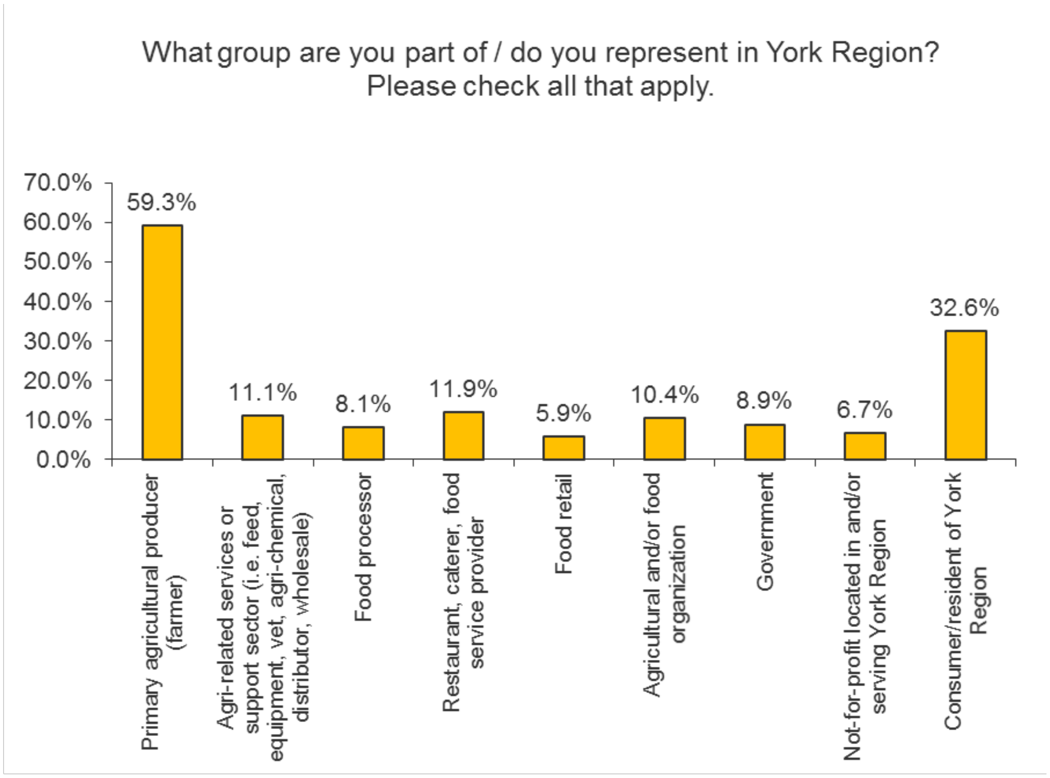

Figure 40: Survey Results – Question: “What group are you part of / do you represent in York Region? Please check all that apply.”

In terms of where survey respondents were from, the Municipalities with the largest representation in the survey were:

- Town of Georgina (23 per cent)
- Town of East Gwillimbury (17 per cent)
- Town of Whitchurch-Stouffville (16 per cent)
- Township of King (12 per cent)

This is reflective of the lower-tier municipalities with more active agricultural sectors (more rural municipalities).

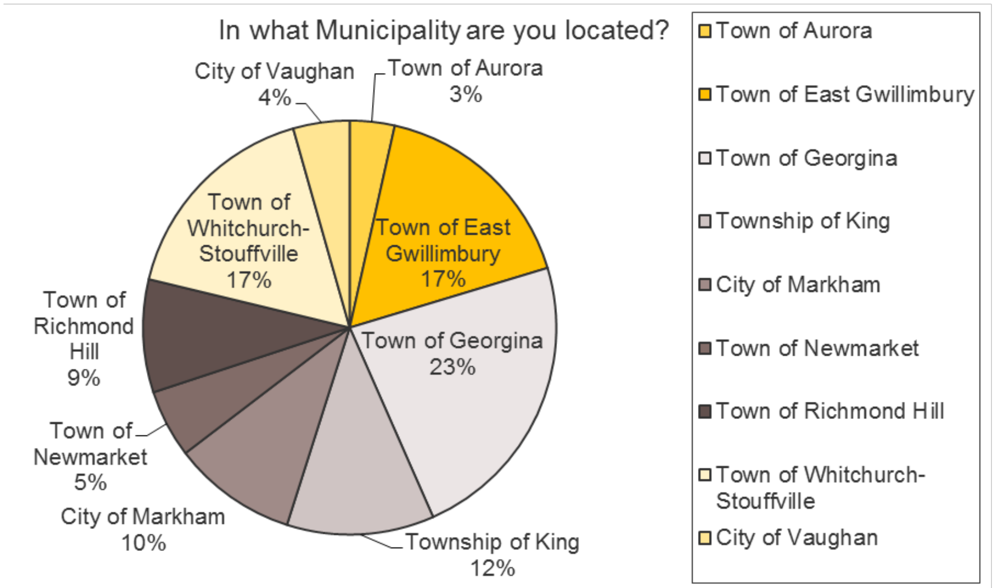

Figure 41: Survey Results – Question: "In what Municipality are you located?"

Production and Processing in York Region

The survey indicated there is a wide range of agri-food production in York Region. Below is not meant to be an exhaustive list of agricultural and agri-food production in the Region, however it provides a snapshot of the diversity of production.

Table 23: Agricultural and agri-food production in the Region

Vegetables / Vegetable Products:	
Tomatoes	Beans
Beets	Asparagus
Eggplant	Sweet corn
Peas	Squash
Artichokes	Pumpkins
Cauliflower	Potatoes
Broccoli	Carrots
Cabbage	Onions
Zucchini	Celery
Microgreens	Mushrooms
Garlic	Dominican food

Fruit / Fruit Products:	
Strawberries	Frozen fruit purees
Raspberries	Jam
Apples	

Grains, Oilseeds & Forage:	
Corn	Hay
Soy	Millet
Wheat	

Livestock:	
Pork	Turkey
Beef	Trout
Milk	Eggs
Ducks	Chicken
Horse (breeders)	Lamb
Rabbits	

Other:	
Prepared foods (catering)	Cannabis & cannabis products
Wild bird seed	Flowers
Honey	Nursery (horticultural products)
Maple syrup	Sod
Hydroponics	
Aquaponics	

In terms of food processing, the respondents indicated the following processing areas:

Grain/seed milling and blending
Livestock feed
Doughs, breads, pizzas, focaccias
Soups
Prepared meals
Edible beans
Milk production
Animal livestock
Jams, muffins, pies
Hydroponics (lettuce, microgreens)
Aquaponics (tilapia and microgreens)
Garlic derivatives
Cannabis derivatives
Farm grain cleaning
Cooking, canning, freezing fruit / vegetables
Slaughter, package and further processing (animal livestock)
Manufacture prepared foods
Prepared Dominican foods
Added value bird seed
Cakes
Freezer beef sales
Baked goods
Fresh apple cider
Natural vinegars
Honey
Maple syrup (boil and prepare for retail)
Process onions, carrots, celery, beets
Washing and packaging of lettuce microgreens for retail sale
Prepare sauces, proteins and vegetables
Pick your own strawberries and asparagus
Process chicken
Fish
Fruit syrups

Additional comments from multiple survey respondents have been summarized below:

- There is significant interest in developing a staff position at the Region. Respondents provided examples of an OMAFRA Agricultural Representative, or something similar to the approach used in Durham Region.
    - Respondents suggested this staff person could have an economic development and/or land use planning background and agricultural experience. Respondents felt that agriculture and food do not have the profile or staff support of other sectors, such as manufacturing.

> *"Staffing is important to help with collaboration between primary producers, processors and retail" (Survey Respondent)*

- Respondents also indicated an interest in developing outreach and educational programs to help connect producers with consumers. Some felt meeting consumers and sharing knowledge and information about normal

> *"Being a primary producer, we have constant concerns for our future in York Region. Policies such as the Greenbelt have helped to preserve some farmland which we can rely on in the long term. However, future sustainability does require diversification and in some cases, intensification and the current restrictions for building is creating extreme limitations in that regard. I believe there are unique opportunities to access a variety of food products, however there is significant risk associated with market and product development, thus limiting the incentive to pursue these markets." (Survey Respondent)*

farming practices would have a significant impact in their municipalities. In addition, an Agricultural Impact Assessment was also suggested as a way to ensure Regional policies and/or development projects do not negatively impact agricultural producers.

"The County of Simcoe is working on a food hub / food sustainability project.
(Survey Respondent)

Open House Discussion

Conversation #1: Local Customer = Local Potential?
We are close to a large and demographically diverse urban centre…how can we take advantage of this?

Conversations at this table reinforced that York Region has a comparative advantage and future opportunity due to its proximity to the GTA. Ideas that were raised included:

- Support the development of educational opportunities at local schools
- Develop and support a food incubator or hub where producers could develop and commercialize new products. The Link in Georgina was suggested as a potential site for this
- Develop marketing initiative for local farmers' markets to introduce/connect buyers with their producers
- Develop a forum/create an opportunity for the Region to learn about key challenges for accessing local markets (regulatory issues, direct farm marketing challenges, etc.)
- Encourage producers to diversify (niche production, specialty crops, world crops, etc.)
- Explore innovative financial mechanisms (taxation, development charges, etc.) that can incentivize local production

Some things to consider include:

- Branding and marketing (signage, joint marketing)
- Biosecurity challenges (limit on-farm visits)
- There are insurance costs for value-added
- Overall security issues ("some of us don't want strangers on the farm")

Conversation #2: Food Companies + Farm Businesses = Opportunities for Innovative Partnerships?
York Region is home to many farms and food companies…is there any way to work together more effectively?

This table focused on potential opportunities and collaborations as there is a cluster of food companies/processing in the Region. Ideas that were developed here include:

Figure 42: Photo of group from conversation #2

- Support and develop innovative partnership with retailers
    - Eat local marketing for the Region; food festivals
    - Develop (or find an existing program) that connects GTA chefs with producers
    - Partner and develop initiative that sells 'ugly' vegetables/fruits (Sell for less; support food security initiatives)
- Support relationship building with food distribution companies
- Develop mentorship program
    - New entrants can connect with established producers

Some things to consider when developing these partnerships include:

- Who will lead these partnerships? An agricultural organization? Municipalities? The Region?
- Some producers prefer to ship to distributors – do not want to coordinate this
- Supply chain challenges: Perishable products; regulatory challenges
- Some find that their voices are not heard through the development of initiatives like these. Would need to ensure producers have equal 'say'

Conversation #3: Big Ideas + Technology = New Opportunities?
New technology is changing our world. What technology and innovations would take agriculture and food in York Region to the next level?

With York Region building a profile as an innovative information technology (IT) cluster, this table focused on potential opportunities for York's agri-food sector to take advantage of its proximity to a high-tech hub. Some ideas developed at this table include:

Figure 43: Dr. Bronwynne Wilton speaking to attendees

- Before we can take advantage of this, we need a strong internet connection (in North part of the Region specifically)
    - Fiber-optic connectivity is better than satellite (strong connection)

    - Would improve crop production practices (could take advantage of precision agriculture technology)
    - Would improve connectivity for GPS technology
- Use technology to improve traceability (e.g. trace products back to specific farms)
- Develop a directory of agri-food technology
    - Categorize by sectors/commodities
    - Test new agri-food technology in the Region
- Partner with universities to test new technologies in agriculture (e.g. University of Guelph; Muck Crops Research Station)
- Improve weather forecasting technology (more local, more specific)
    - Holland Marsh would benefit from wind erosion information
- Controlled environment agriculture (can control climate, and reuse waste)
- Drone technology applications to agriculture

Conversation #4: Simple Changes = Make things work for everyone
Are there any 'simple changes' that could make agriculture and food in York Region better?

This table provided an opportunity for participants to brainstorm simple changes (at the Regional and Municipal level) that could have positive impacts on their operations. Some potential changes include:

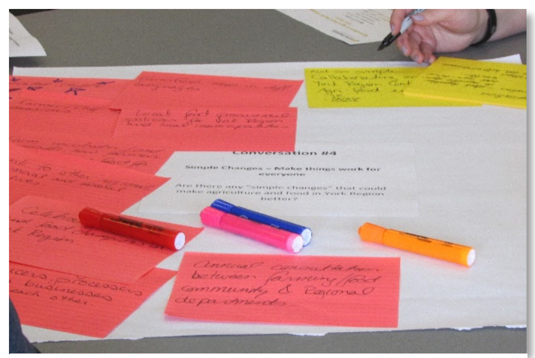

Figure 44: Participation from event

- Develop a land speculation tax that would increase rate for foreign buyers and discourage short-term land rental agreements
- Agricultural buildings should be exempt from 'major development' in Oak Ridges Moraine Act
    - Provide consideration of agriculture facilities with '5 tonne per axel' year round
- Develop an online tool: Farm Directory for York Region
    - List of farms
    - Map of farms
    - What farms are selling direct or where you can purchase products
    - 'Dating service' that connects producers with processors with retailers, etc.
- Increase communication between the Region and the sector
    - Provide an annual consultation between farming/food community and Regional departments
- Develop consistent marketing for the sector through Farm Fresh organization
    - Release the Farm Fresh map in additional languages
- Showcase agricultural businesses (newsletters, TV, social media, etc.)
- Support farmer/chef networking sessions

- Develop local food procurement policies for York Region
- Leverage ongoing regional, provincial and federal initiatives

Conversation #5: Collaboration + Leadership = Success

There are multiple groups, organizations and companies working in agriculture and food in York Region…how can we leverage this collective energy and who should take on the leadership role? And what does this leadership role look like?

Through the online survey and interviews, we consistently heard that there are several organizations, projects and initiatives that are interested in agriculture and food. This table provided an opportunity to discuss how to leverage this interest and move forward. We also wanted input on who should lead this and what would that leadership role look like:

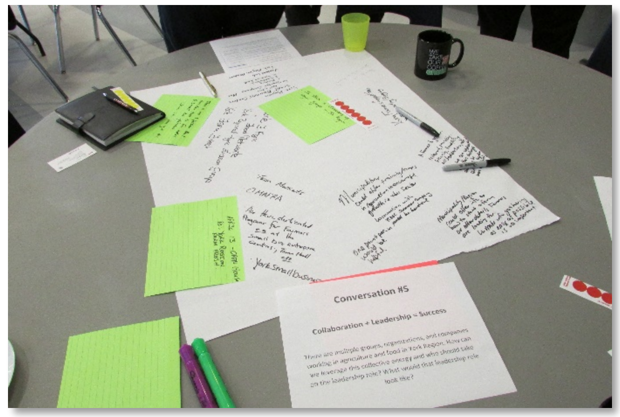

Figure 45: Participation from event

Potential organizations to include in this discussion include:

- York Farm Fresh
- *York Small Business Enterprise Centre* (YSBEC) for Starter Company training/ mentorship/funding
- VentureLab
- York Region Makers
- York Region Food Network
- Farmers Markets
- OMAFRA
- Lower-tier municipalities
- York Region
- Youth organizations (i.e. 4H)

Participants indicated there should be a “one-point person” to help coordinate efforts. Several participants felt this was a role for the Region to develop and support. Services to be provided included:

- Plan events and forums to gather input from whole value chain (production through to retail)
- Resources for new entrants / start-ups
- Connect people with small business enterprises (training opportunities)
- Develop and maintain a directory
- Facilitate relationship building across the sector

Appendix E: Additional 2016 Census of Agriculture Data

Farm Area and Production in York Region

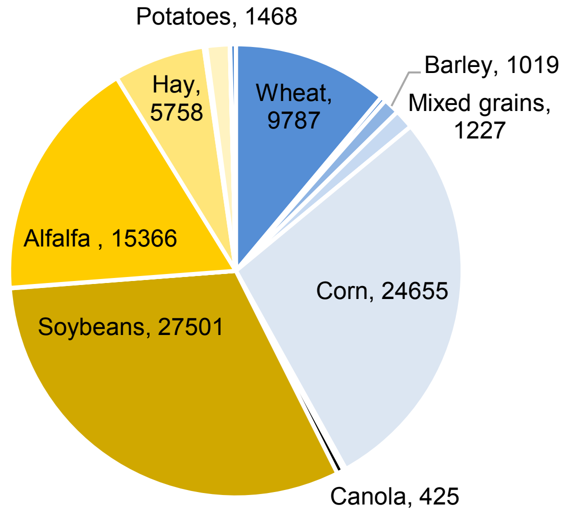

Figure 46: Field crop production by acres (2016)

Soybeans, corn, alfalfa, wheat, and hay are York Region's five largest field crops, by area.

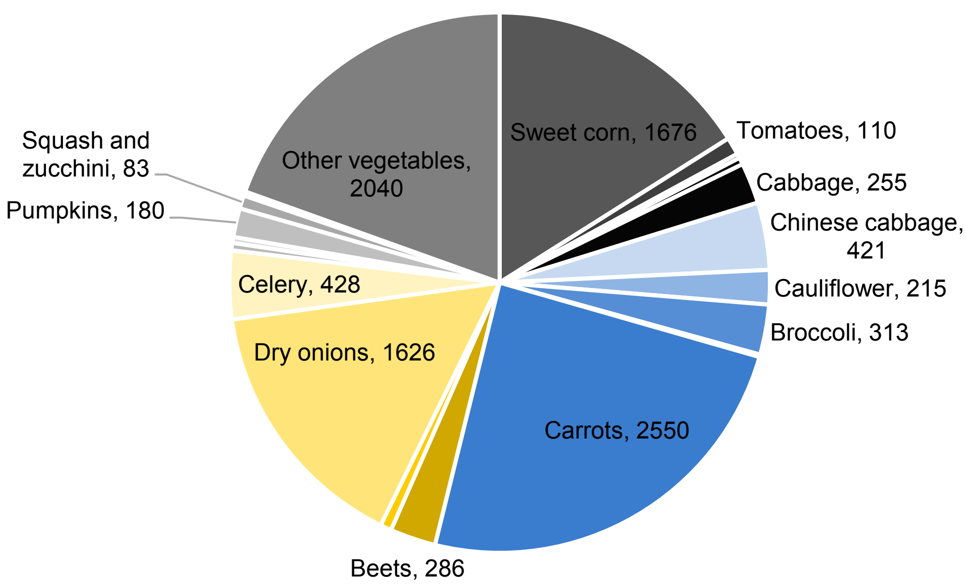

Figure 47: Vegetable production by acres (2016)

Carrots, sweet corn, dry onions, celery, and Chinese cabbage are the five largest vegetable crops, by area. This is largely due to the production in the Holland Marsh.

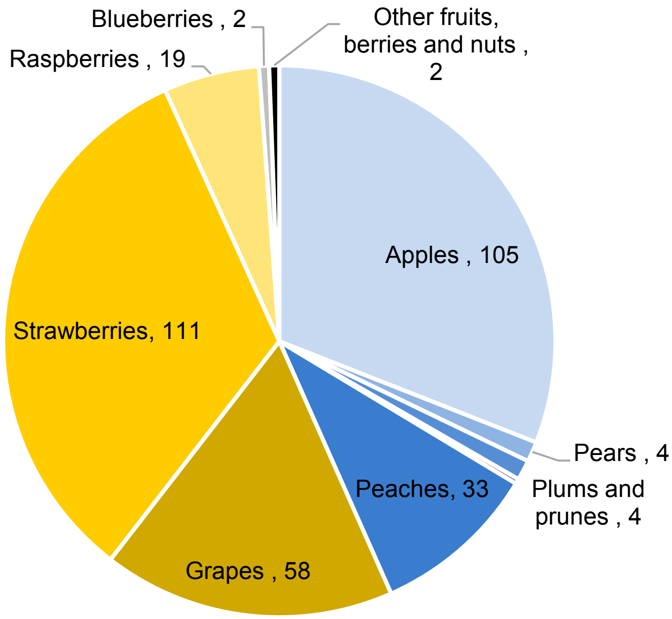

Figure 48: Fruit production by acres (2016)

Strawberries, apples, grapes, peaches, and raspberries are the five largest fruit crops, by area. Interesting to note is the equine industry in York Region. Horse and pony numbers have significantly decreased over time (33.7 per cent just in the last 5 years).

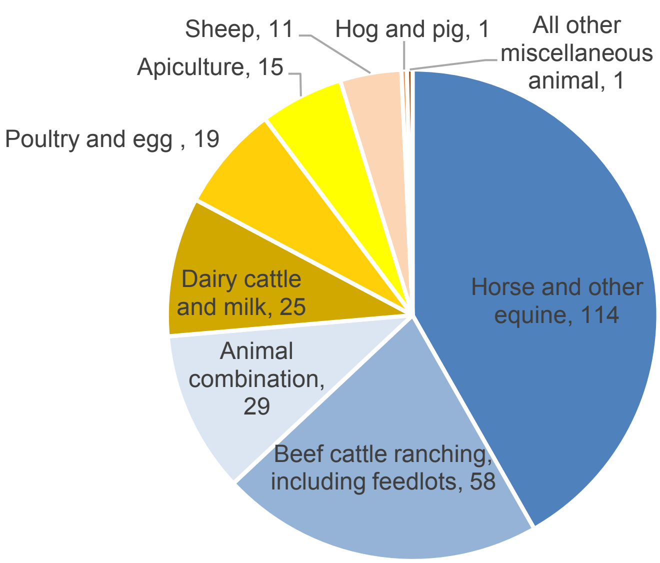

Figure 49: Livestock production by number of farms

Horse/equine, beef cattle ranching, animal combination and dairy cattle and milk make up the largest numbers of farms in York Region. As stated in section 5 of this report, the number of livestock farms has significantly reduced in York Region since 2001. However, animal livestock production remains an important sub-sector to York Region in terms of economic contribution.

Table 24: Horse and Pony Numbers in York and Other Comparative Regions

Horses and ponies (heads)	Estimated[70] 2001	Estimated 2006	Estimated 2011	Estimated 2016	% change 2011-2016 (last five years)
Wellington	21,111	27,530	25658	19613	-23.6%
Durham	15,990	18,147	16754	13124	-21.7%
Simcoe	16,856	19,516	19586	12125	-38.1%
York	14,071	16,735	13662	9060	-33.7%

York Region has an estimated 9,060 equine animals. This has declined from approximately 17,000 in 2006. Comparatively to other regions, York has one of the lowest numbers of equine animals. The Region ranks at the bottom for equine numbers in 2016 for Southern Ontario. Observing horse and pony numbers by lower-tier municipality, it is seen that King Township drives the York Region equine numbers. Whitchurch-Stouffville and Georgina have experienced a decline in 1,000 animals in the last 5 years.

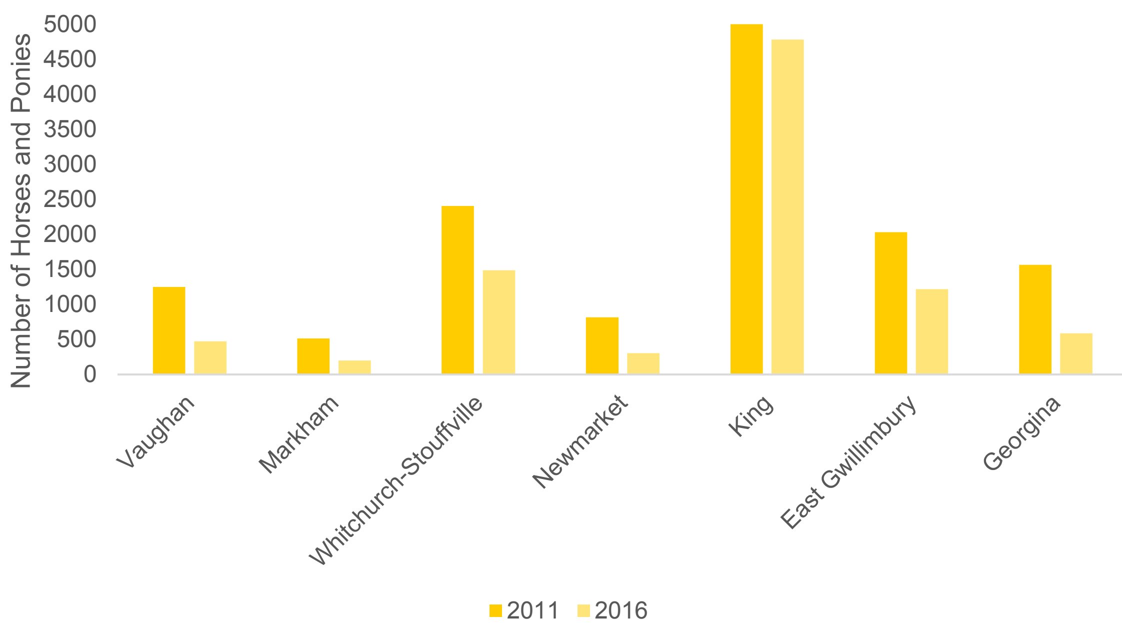

Figure 50: Horse and Pony Numbers by Lower-Tier Municipality

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70 Wright and Cation (1996) suggest a base multiplier of 3.9, which was used here to manipulate the census data. The authors argue that the census data does not depict an accurate representation of the present and actual equine numbers.

In summary, although vegetables make up a large proportion of total farm cash receipts in the Region, more land area is under field crop production (i.e. soybean, corn, alfalfa, and wheat). Livestock farms have declined significantly in York Region including a large decline in numbers in the equine sector.

Farm Operators in York Region

The proportion of farm operators by sex and age in York Region has stayed somewhat consistent since 2001. Figure 32 and 33 below break down the farm operators by gender and age category.

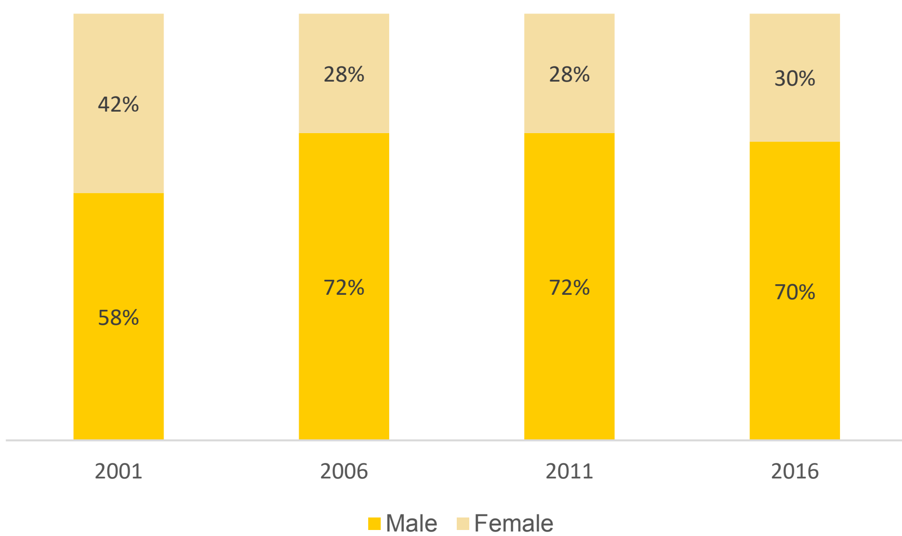

Figure 51: Percentage of farm operators by gender (2001-2016)

Farm operator gender proportions have been consistent in York Region since 2006, ranging from 70-72 per cent male.

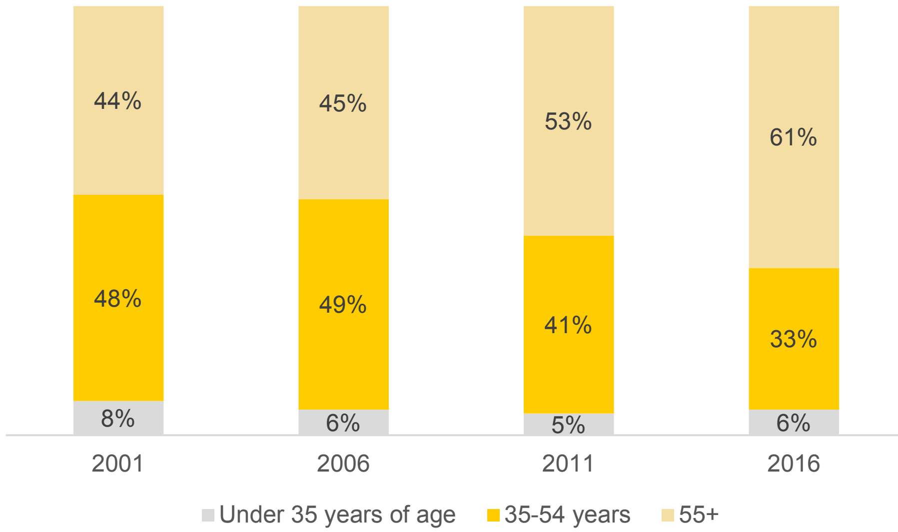

Figure 52: Percentage of farm operators by age (2001-2016)

As the average age of the farm operator is increasing each census year in York Region, as well as the province, the proportion of operators in the 55 years and older category is growing.

Appendix F: Changes to updated Greenbelt Plan and Growth Plan – *Agricultural System*

OMAFRA's draft document, *Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe*, identifies the following *Agricultural System* policies as shared between both the *Greenbelt Plan* and the *Growth Plan for the Greater Golden Horseshoe*.[71]

- Specify that the province will identify an *Agricultural System* for the GGH that includes a continuous land base, comprised of prime agricultural areas including specialty crop areas, and rural lands, as well as a complementary agri-food network that supports long-term agricultural production and the economic viability of the agri-food sector
- Require municipalities to update official plan mapping in accordance with provincial mapping of the agricultural land base and guidance to protect these areas for long-term use in agriculture Require that municipalities avoid, minimize or mitigate impacts on the *agricultural system* when considering new or expanded settlement areas, aggregate operations and infrastructure projects, and in some cases, other non-agricultural uses. In some cases, an Agricultural Impact Assessment (AIA) or equivalent analysis as part of an Environmental Assessment for infrastructure will be required.
- State that in prime agricultural areas, new aggregate operations, where possible, will maintain or improve connectivity of the *agricultural system*
- Permit a variety of uses in prime agricultural areas where agricultural uses and non-agricultural uses interface
- Require that land use compatibility be achieved, in particular in areas where agricultural uses and non-agricultural uses interface
- Through Official Plan review, permit a variety of uses in prime agricultural areas (agricultural, agriculture-related and on-farm diversified uses), aligned with PPS and the *Guidelines on Permitted Uses in Prime Agricultural Areas* (OMAFRA, 2016)
- Require municipalities to implement strategies to support and enhance the *agricultural system* when undertaking integrated planning for growth management, including goods movement and transportation planning
- Encourage municipalities to support the long-term economic prosperity and viability of the agri-food sector, for example, through:
    - Local food initiatives (e.g. food hubs, procurement policies)
    - Integration of agricultural economic development, infrastructure, goods movement and freights considerations when land use planning
    - **Preparing regional agri-food and economic development strategies**
    - Engaging with local farmers and agri-food experts (e.g. through agricultural advisory committees and liaison officers)

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[71] These policies can be found on page 9 of OMAFRA's draft report.

- Provide outreach and education opportunities

Upon completion and release of the Golden Horseshoe Agricultural Systems land base map, York Region should consider these changes.

Appendix G: 27 NAICS Industries Included in Economic Analysis (Agri-food Sector)

Industries Included:
1110 (includes 111 and 112) – Farms

- 111 – Crop production
    - This subsector comprises establishments, such as farms, orchards, groves, greenhouses and nurseries, primarily engaged in growing crops, plants, vines, trees and their seeds (excluding those engaged in forestry operations). Industries have been created taking into account input factors, such as suitable land, climatic conditions, type of equipment, and the amount and type of labour required. The production process is typically completed when the raw product or commodity grown reaches the farm gate for market, that is, at the point of first sale or price determination. Establishments in these industries may use traditional crop production methods, employ modified or improved crop inputs, or engage in organic crop production.
    - An establishment is classified within this subsector provided that fifty per cent or more of the establishment's agricultural production consists of crops. Establishments with fifty per cent or more crop production and with no one product or family of products accounting for fifty per cent of the production are treated as combination crop farms and classified to 11199 All other crop farming, except if fifty per cent or more of the production is a combination of oilseeds and grains, in which case they are classified to 11119 Other grain farming.
- 112 – Animal production and aquaculture
    - This subsector comprises establishments, such as ranches, farms and feedlots, primarily engaged in raising animals, producing animal products and fattening animals. Industries have been created taking into account input factors such as suitable grazing or pasture land, specialized buildings, type of equipment, and the amount and type of labour required.
    - An establishment is classified within this subsector provided that fifty per cent or more of the establishment's agricultural production consists of animal production or aquaculture. Establishments with fifty per cent or more animal production or aquaculture and with no one product or family of products accounting for fifty per cent of the production are treated as combination animal farms and classified to 11299 All other animal production.

1150 (includes 1151 and 1152) – Support activities for farms

- 1151 – Support activities for crop production
    - This industry group comprises establishments primarily engaged in providing support activities for growing crops.
- 1152 – Support activities for animal production
    - This industry group comprises establishments primarily engaged in providing support activities related to raising livestock, including companion animals

3111 – Animal food manufacturing - Animal food manufacturing

- This industry group comprises establishments primarily engaged in manufacturing food and feed for animals, including pets.

3112 – Grain and oilseed milling - Grain and oilseed milling

- This industry group comprises establishments primarily engaged in milling grains and oilseeds; refining and blending fats and oils; and making breakfast cereal products.
- Exclusion(s)
    - Milling grain to make animal feed (See 3111 Animal food manufacturing)

3113 – Sugar and confectionery product manufacturing - Sugar and confectionery product manufacturing

- This industry group comprises establishments primarily engaged in manufacturing sugar and confectionery products.

3114 – Fruit and vegetable preserving and specialty food manufacturing - Fruit and vegetable preserving and specialty food manufacturing

- This industry group comprises establishments primarily engaged in manufacturing frozen fruits and vegetables; frozen entrées and side dishes of several ingredients, except seafood; and fruits and vegetables preserved by pickling, canning, dehydrating and similar processes.

3115 – Dairy product manufacturing - Dairy product manufacturing

- This industry group comprises establishments primarily engaged in manufacturing dairy products. Establishments primarily engaged in manufacturing substitute products are included.

3116 – Meat product manufacturing - Meat product manufacturing

- This industry group comprises establishments primarily engaged in manufacturing meat products.

3117 – Seafood product preparation and packaging - Seafood product preparation and packaging

- This industry group comprises establishments primarily engaged in canning seafood, including soup; smoking, salting and drying seafood; preparing fresh fish by removing heads, fins, scales, bones and entrails; shucking and packing fresh shellfish; processing marine fats and oils; and freezing seafood. Establishments known as floating factory ships, that are engaged in shipboard processing of seafood, are included.

3118 – Bakeries and tortilla manufacturing - Bakeries and tortilla manufacturing

- This industry group comprises establishments primarily engaged in manufacturing baked goods. Establishments primarily engaged in manufacturing bakery products, for retail sale, but not for immediate consumption, are included.

3119 – Other food manufacturing - Other food manufacturing

- This industry group comprises establishments, not classified to any other industry group, primarily engaged in manufacturing food.

3121 – Beverage manufacturing - Beverage manufacturing

- This industry group comprises establishments primarily engaged in manufacturing beverages.
- Exclusion(s)
    - Canning fruit and vegetable juices; freezing juices and drinks (See 3114 Fruit and vegetable preserving and specialty food manufacturing)
    - Manufacturing milk-based drinks (See 311511 Fluid milk manufacturing)
    - Manufacturing soft drink bases or fruit syrups for flavouring; coffee and tea, except ready-to-drink; powdered drink mixes; and non-alcoholic cider (See 3119 Other food manufacturing)

3253 - Pesticide, fertilizer and other agricultural chemical manufacturing

- This industry group comprises establishments primarily engaged in manufacturing agricultural chemicals, including nitrogenous and phosphoric fertilizer materials; mixed fertilizers; and agricultural and household pest control chemicals.

3254 - Pharmaceutical and medicine manufacturing

- This industry group comprises establishments primarily engaged in manufacturing drugs, medicines and related products for human or animal use. Establishments in this industry may undertake one or more of several processes, including basic processes, such as chemical synthesis, fermentation, distillation and solvent extraction; grading, grinding and milling; and packaging in forms suitable for internal and external use, such as tablets, vials, ampoules and ointments.

3331 - Agricultural, construction and mining machinery manufacturing

- This industry group comprises establishments primarily engaged in manufacturing machinery designed for use in the agriculture, construction and mining industries.

4111 – Farm product merchant wholesalers

- This industry group comprises establishments primarily engaged in wholesaling livestock, grain and other farm products.

4131 – Food merchant wholesalers

- This industry group comprises establishments primarily engaged in wholesaling processed milk and other dairy products, poultry and eggs, fish and seafood products, fresh fruit and vegetables, red meat and meat products, bread and other bakery products, processed rice, flour, flour mixes, prepared cereal foods and spices.

4132 - Beverage merchant wholesalers

- This industry group comprises establishments primarily engaged in wholesaling alcoholic and non-alcoholic beverages.

4171 – Farm, lawn and garden machinery and equipment merchant wholesalers - Farm, lawn and garden machinery and equipment merchant wholesalers.

- This industry group comprises establishments primarily engaged in wholesaling new or used farm, lawn and garden machinery, equipment and parts

4183 – Agriculture supplies merchant wholesalers

- This industry group comprises establishments primarily engaged in wholesaling agricultural feeds, seeds and processed seeds, agricultural chemicals and other farm supplies.

4442 - Lawn and garden equipment and supplies stores

- This industry group comprises establishments primarily engaged in retailing lawn and garden equipment and supplies.

4451 - Grocery stores

- This industry group comprises establishments primarily engaged in retailing a general line of food products.

4452 - Specialty food stores

- This industry group comprises establishments primarily engaged in retailing specialized lines of food products.

4453 - Beer, wine and liquor stores

- This industry group comprises establishments primarily engaged in retailing packaged alcoholic beverages, such as beer, wine and liquor.

4931 - Warehousing and storage

- This industry group comprises establishments primarily engaged in operating general merchandise, refrigerated and other warehousing and storage facilities. Included in this industry group are third-party warehouses serving retail chains and wholesalers. Establishments in this industry group provide facilities to store goods for customers. They do not take title to the goods they handle. These establishments take responsibility for storing the goods and keeping them secure. They may also provide a range of services, often referred to as logistics services, related to the distribution of a customer's goods. Logistics services can include labelling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing and transportation arrangement. However, establishments in this industry group always provide storage services in addition to any logistics services. Furthermore, the storage of goods must be more than incidental to the performance of a service such as price marking.

  Both public and contract warehousing are included in this industry group. Public warehousing generally provides short-term storage, typically for less than thirty days.

Contract warehousing generally involves a longer-term contract, often including the provision of logistical services and dedicated facilities.
Bonded warehousing and storage services, and warehouses located in free trade zones, are included in the industries of this industry group. However, storage services primarily associated with the provision of credit are not.

7223 - Special food services

- This industry group comprises establishments primarily engaged in providing food services at the customer's location, at a location designated by the customer, or from a motorized vehicle or non-motorized cart.

7225 - Full-service restaurants and limited-service eating place

- This industry group comprises establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating, or who order or select items at a counter, food bar or cafeteria line (or order by telephone) and pay before eating. This industry group includes drinking places that primarily serve food.

AGRICULTURE AND AGRI-FOOD SECTOR STRATEGY

SEPTEMBER 2017

For more information on agriculture and agri-food in York Region please contact:

ECONOMIC STRATEGY
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York Region