Golden Horseshoe Food and Farming Alliance

AGRICULTURE and AGRI-FOOD ECONOMIC PROFILE FOR THE GOLDEN HORSESHOE

2014

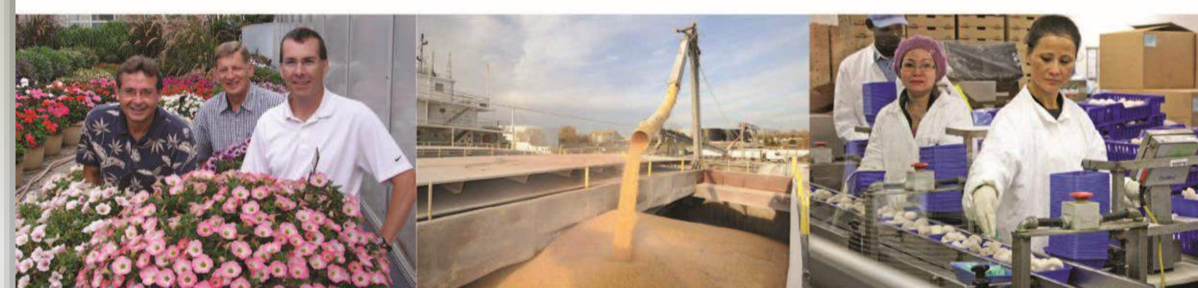
Presented By:
Margaret Walton– Planscape

PLANSCAPE
Building Community Through Planning

October 15, 2014

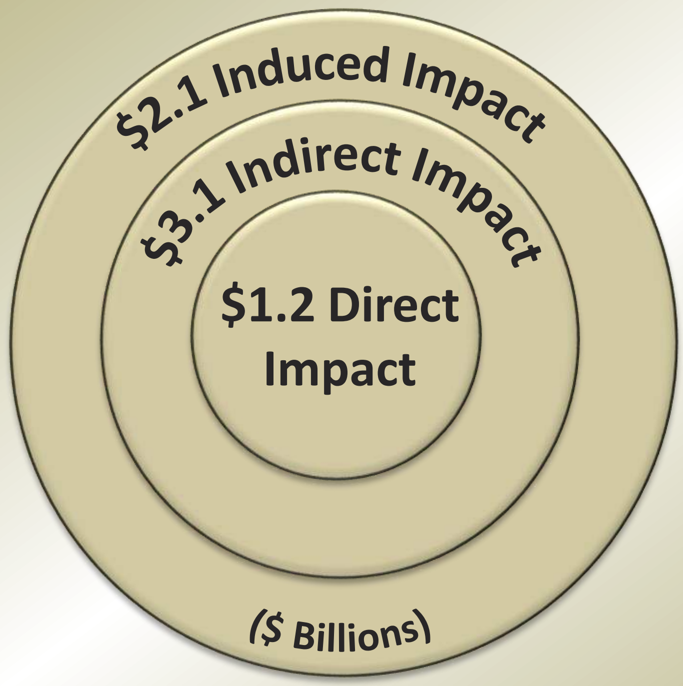
Golden Horseshoe Agriculture & Agri-Food Strategy

Food & Farming: An Action Plan 2021



Economic Impact - 2011

$ 1.7 Billion Gross Farm Receipts

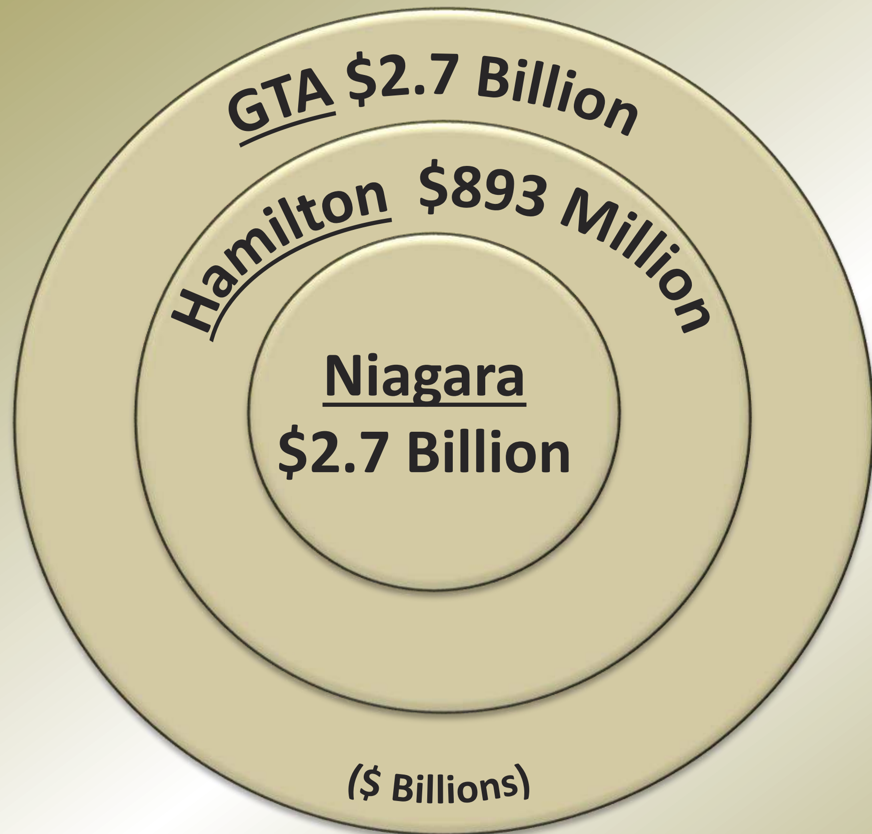


41,000 Jobs

(Approximately $6.3 Billion in Annual Economic Impact)

Economic Impact by Region - 2011

Golden Horseshoe Food and Farming Alliance



Golden Horseshoe –
Approximately $6.3 Billion
in Annual Economic Impact

GTA Includes
(Durham, York, Peel and Halton)

Number of Farms - Regions

Golden Horseshoe Food and Farming Alliance

Halton Region

1981 - 969
1991 – 744
2001 – 619
2011 – 469

Peel Region

1981 - 942
1991 – 711
2001 – 522
2011 – 440

York Region

1981 – 1,741
1991 – 1,185
2001 – 1,020
2011 – 828

Golden Horseshoe

1981 – 11,212
1991 – 8,661
2001 – 7,162
2011 – 6,090

Durham Region

1981 – 2,495
1991 – 2,090
2001 – 1,709
2011 – 1,454

Hamilton

1981 – 1,553
1991 – 1,225
2001 – 1,026
2011 – 885

Niagara Region

1981 – 3,512
1991 – 2,706
2001 – 2,266
2011 – 2,014

Farmland Area (Acres)- Regions

Golden Horseshoe Food and Farming Alliance

Halton Region

1981 – 129,030
1991 – 115,036
2001 – 98,758
2011 – 79,567

Peel Region

1981 – 136,856
1991 – 115,352
2001 – 104,433
2011 – 93,843

York Region

1981 – 248,945
1991 – 190,274
2001 – 175,965
2011 – 153,559

Golden Horseshoe

1981 – 1,295,616
1991 – 1,112,205
2001 – 1,081,138
2011 – 977,481

Durham Region

1981 – 373,611
1991 – 337,222
2001 – 330,286
2011 – 297,012

Hamilton

1981 – 158,519
1991 – 138,382
2001 – 138,879
2011 – 130,589

Niagara Region

1981 – 248,655
1991 – 215,939
2001 – 232,817
2011 – 222,911

Average Farm Size - Regions

Golden Horseshoe Food and Farming Alliance

Halton Region

1991 – 155 Acres
2001 – 160 Acres
2011 – 170 Acres

Peel Region

1991 – 162 Acres
2001 – 200 Acres
2011 – 213 Acres

York Region

1991 – 157 Acres
2001 – 173 Acres
2011 – 185 Acres

Golden Horseshoe

1991 – 128 Acres
2001 – 151 Acres
2011 – 161 Acres

Durham Region

1991 – 161 Acres
2001 – 193 Acres
2011 – 204 Acres

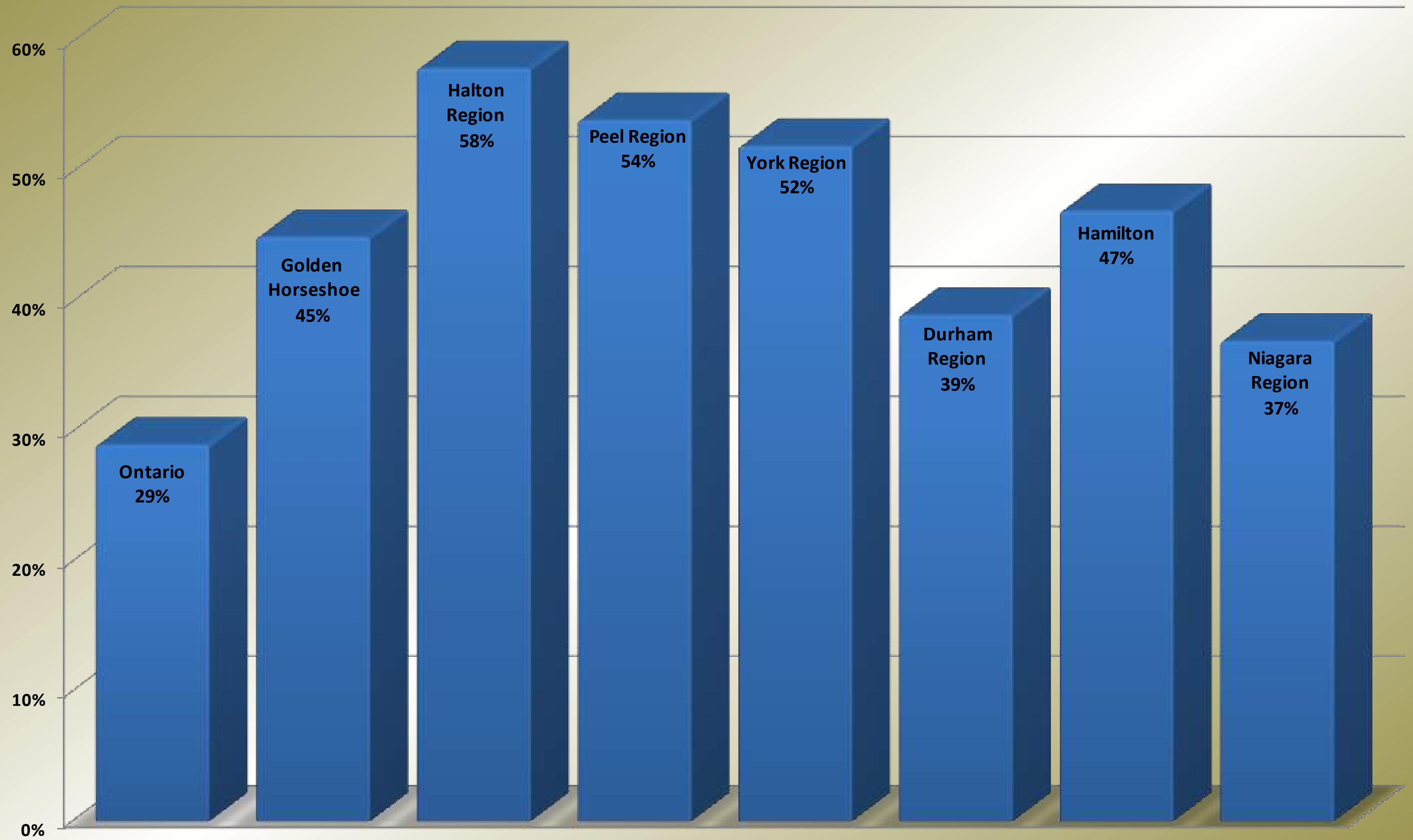
Hamilton

1991 – 113 Acres
2001 – 135 Acres
2011 – 148 Acres

Niagara Region

1991 – 80 Acres
2001 – 103 Acres
2011 – 111 Acres

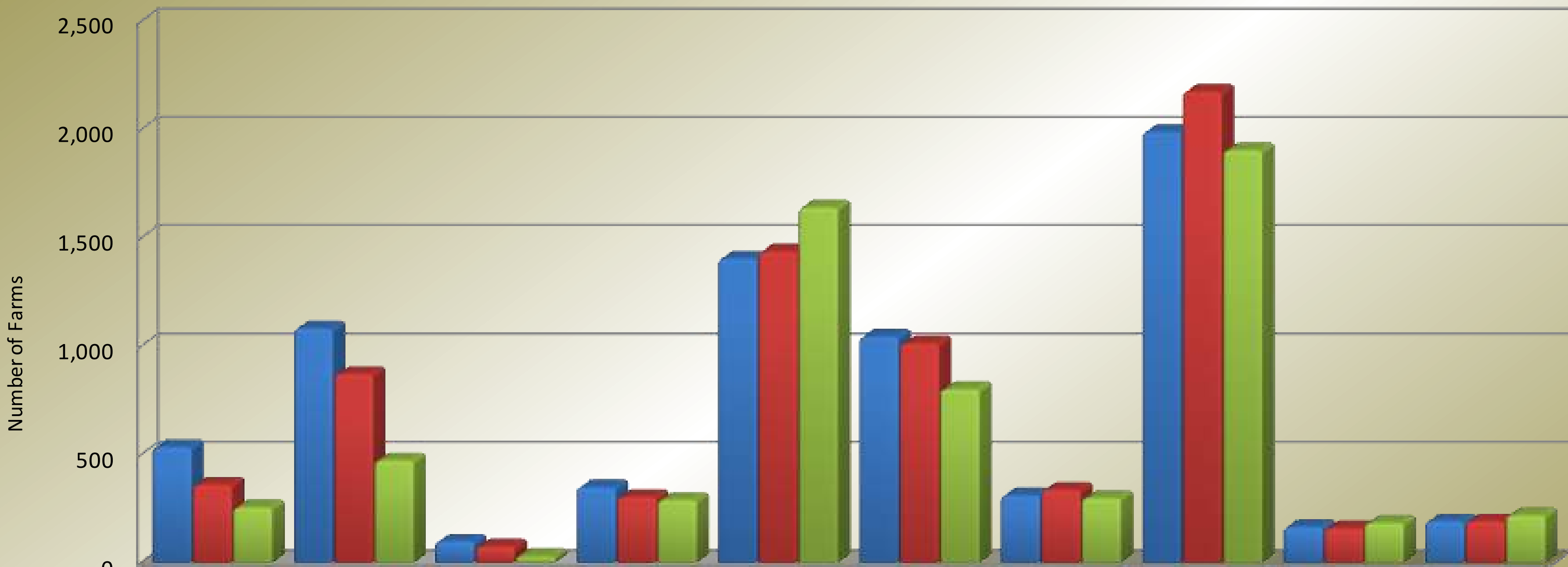
Rental Land - Regions



Commodity Profile – Number of Farms (2011)

Golden Horseshoe Food and Farming Alliance

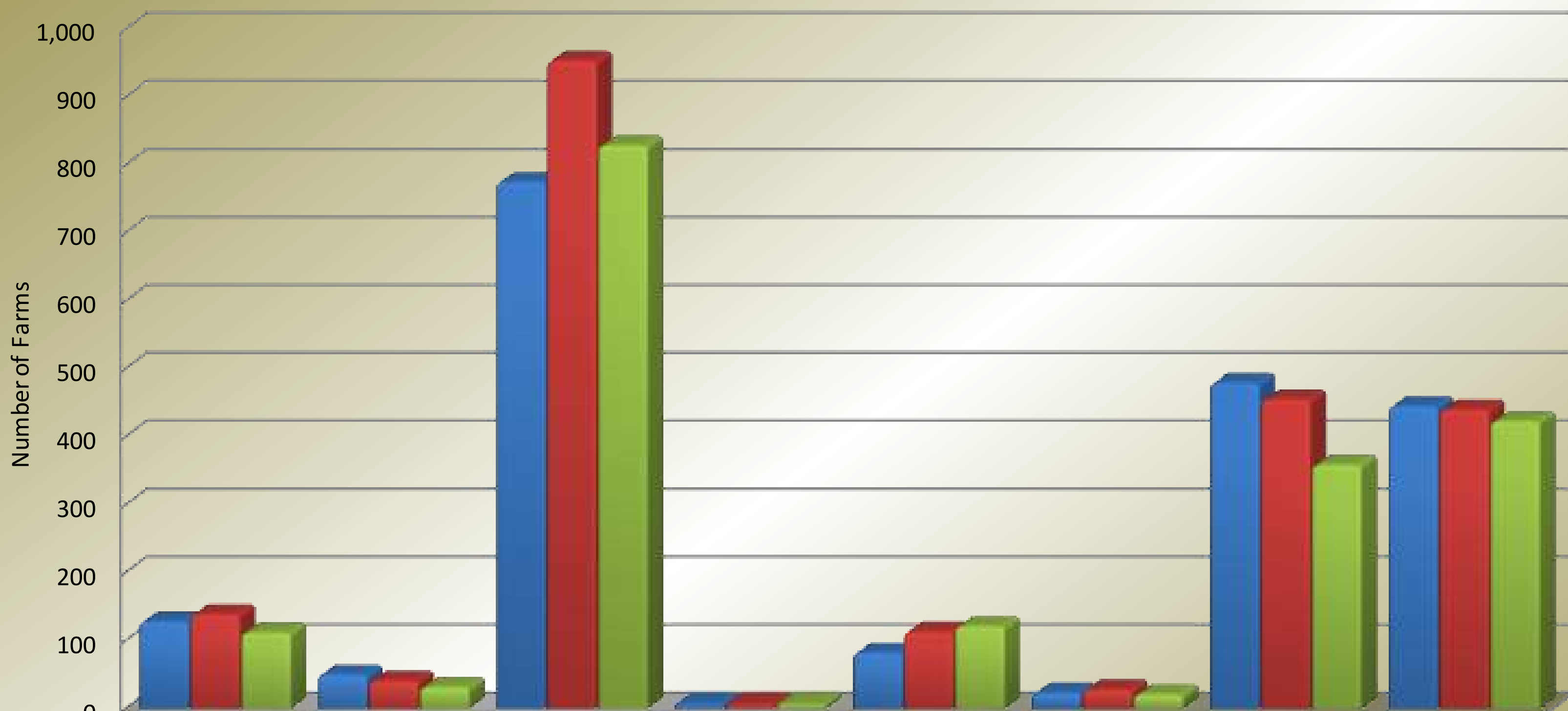
Golden Horseshoe



	Dairy	Cattle	Hog	Poultry & Egg	Cash Crops	Fruit	Vegetable	Miscellaneous Specialty	Livestock Combination	Other Combination
2001	533	1,081	98	348	1,403	1,044	310	1,989	165	191
2006	360	871	75	303	1,437	1,012	336	2,175	158	191
2011	255	472	29	289	1,640	801	298	1,904	183	219

Commodity Profile – Miscellaneous Specialty (2011)

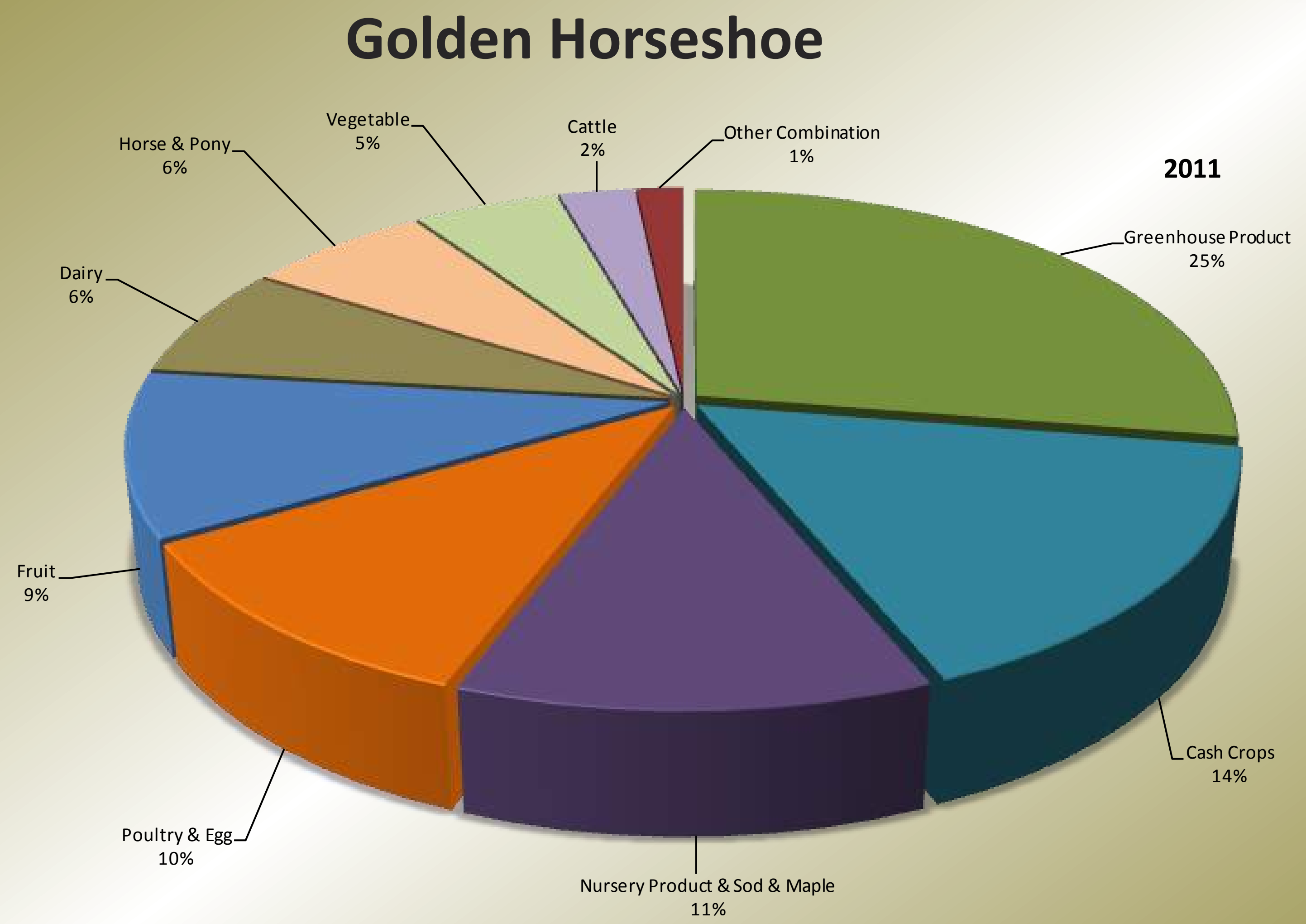
Golden Horseshoe



	Sheep	Goat	Horse & Pony	Fur	Other Livestock Specialty	Mushroom	Greenhouse Product	Nursery Product & Sod & Maple
2001	128	50	775	7	82	23	479	445
2006	139	41	953	6	113	28	455	440
2011	112	32	829	7	121	21	359	423

Top Ten Commodities by Gross Farm Receipts

Golden Horseshoe Food and Farming Alliance



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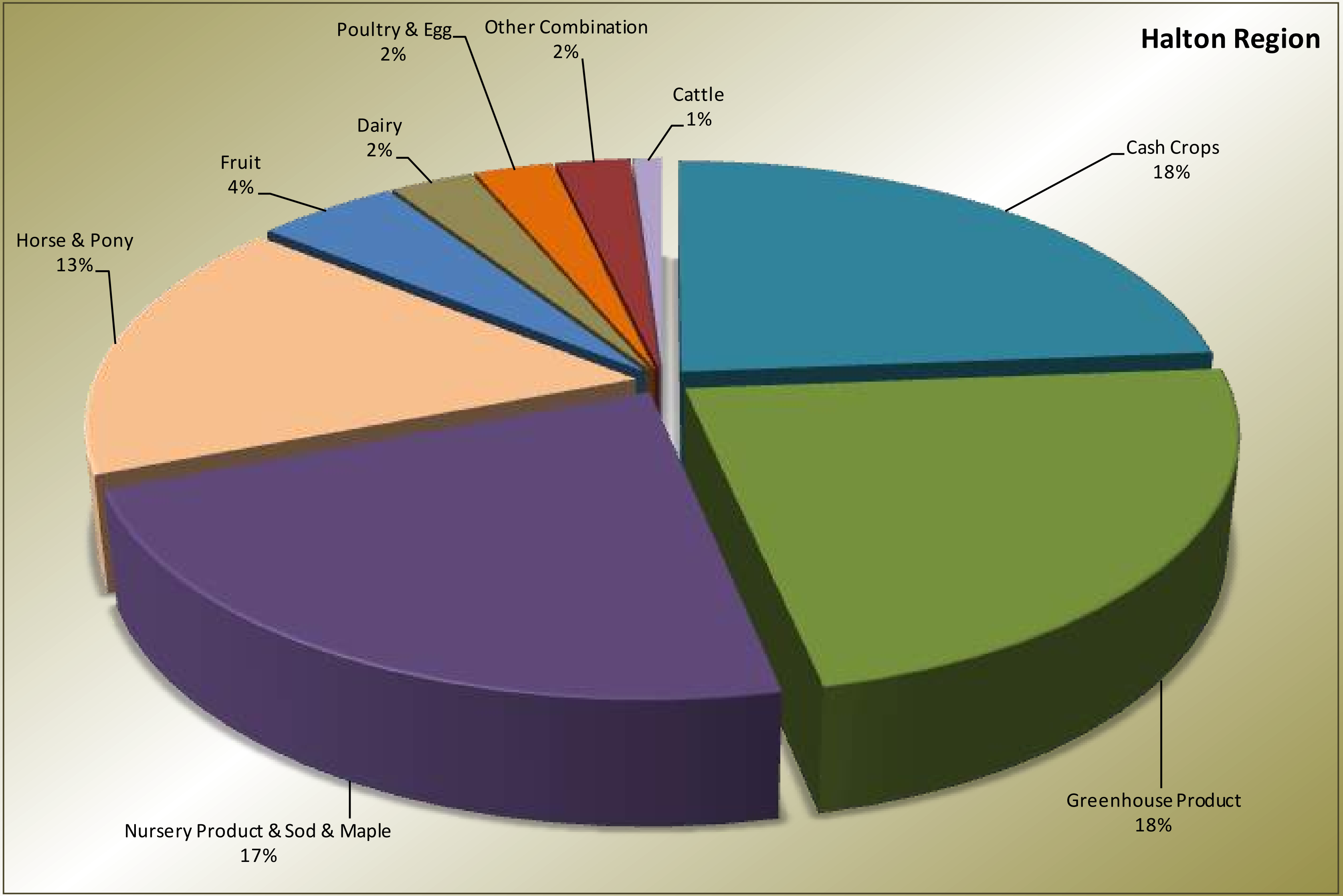

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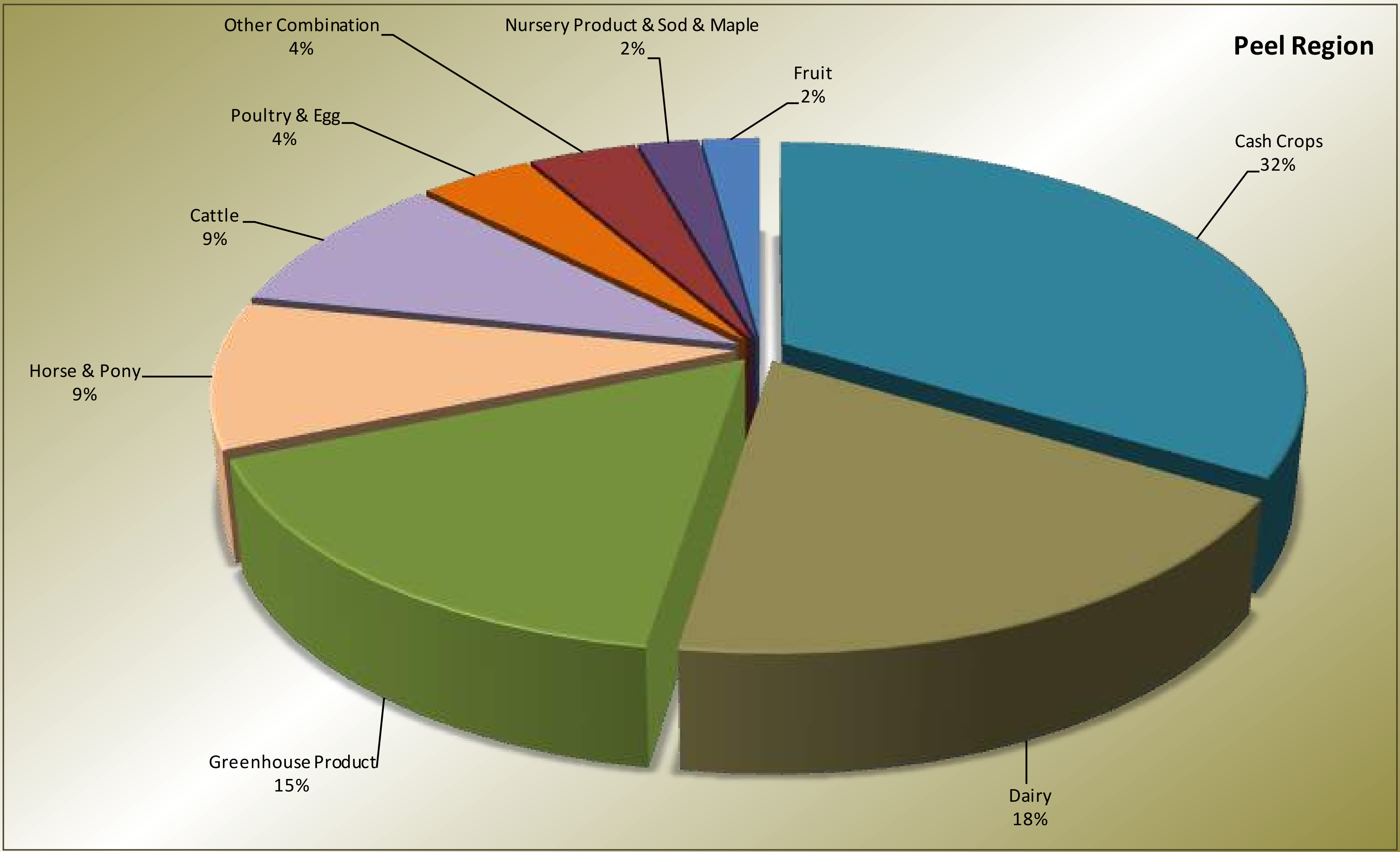

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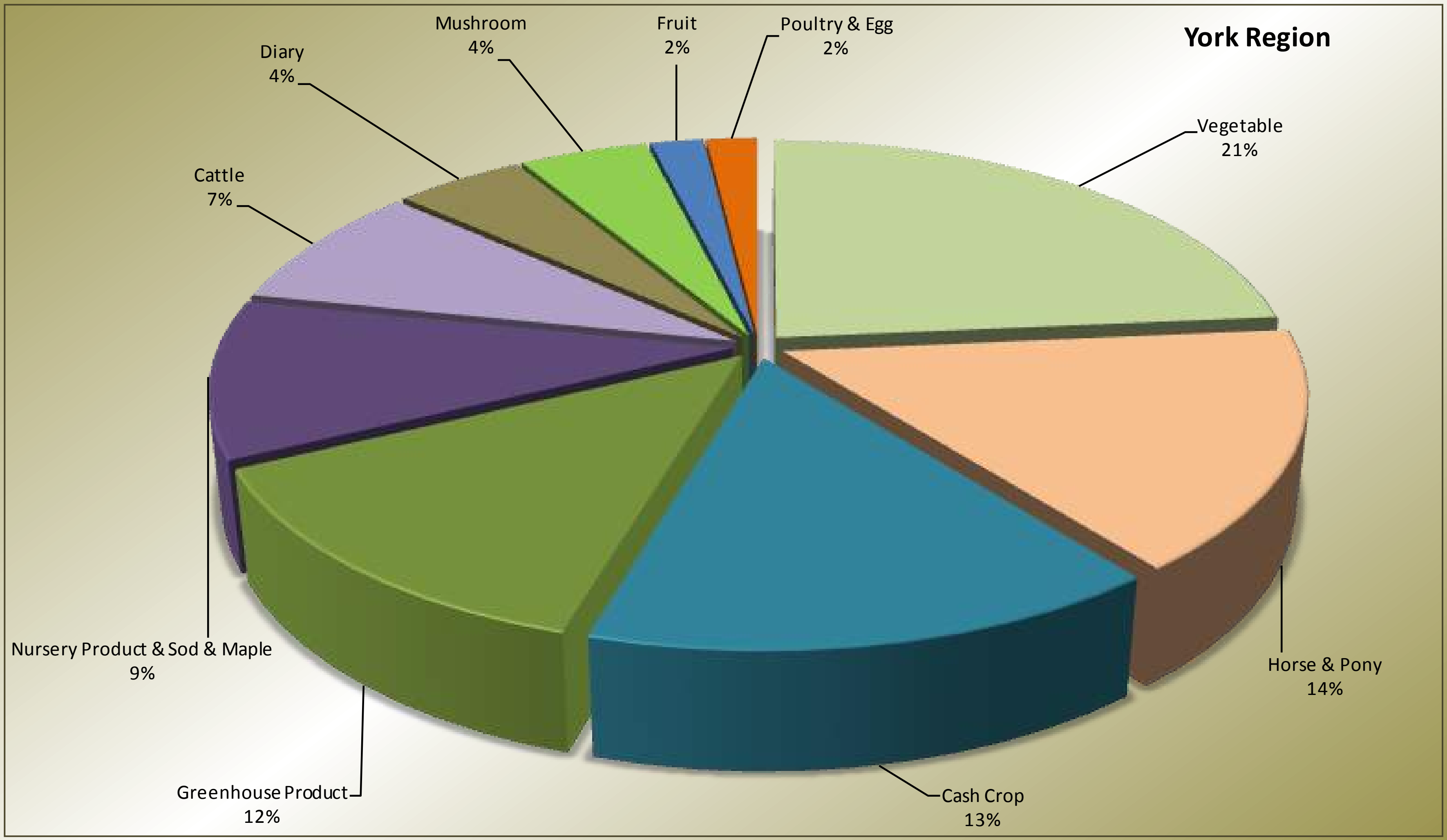

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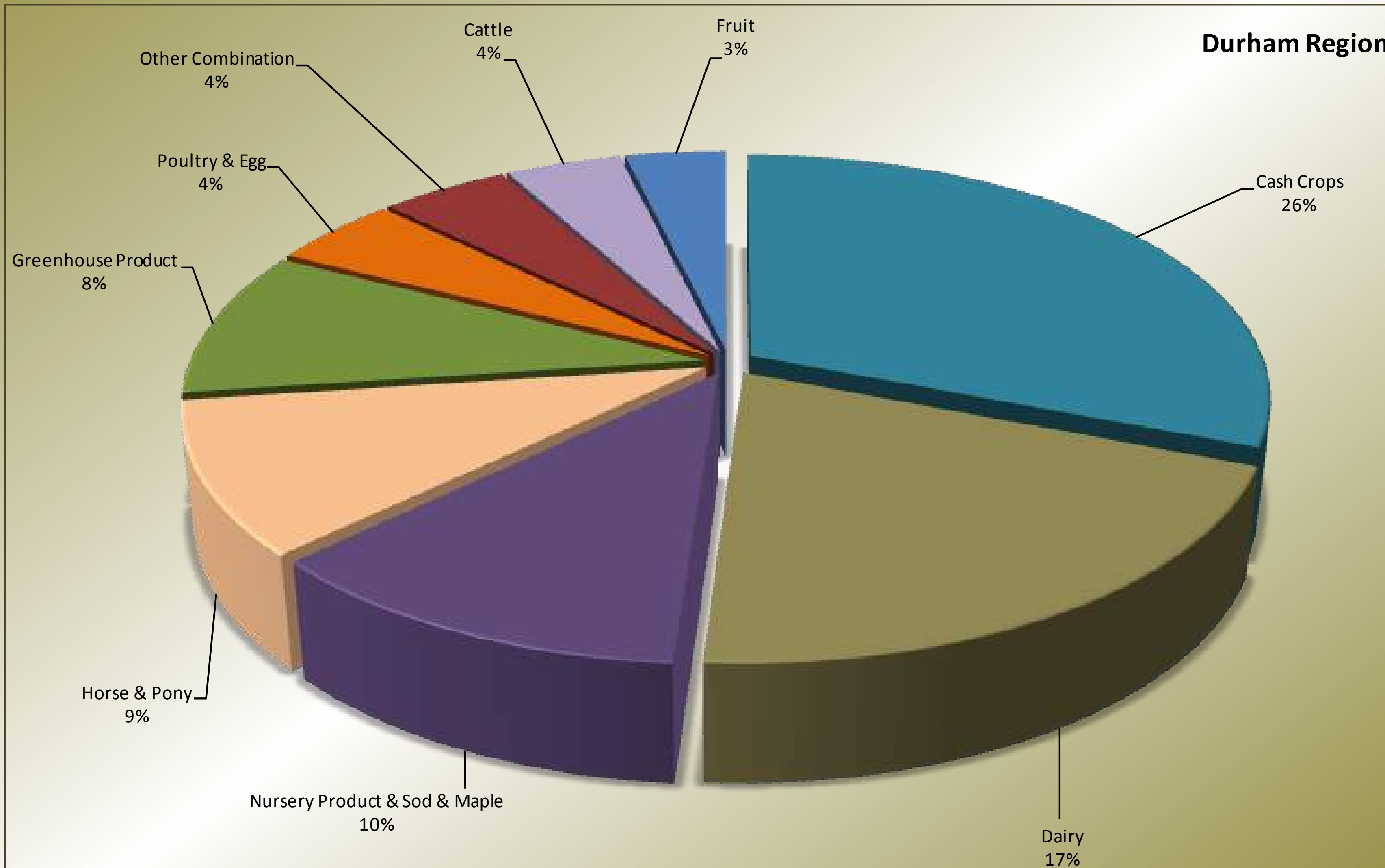

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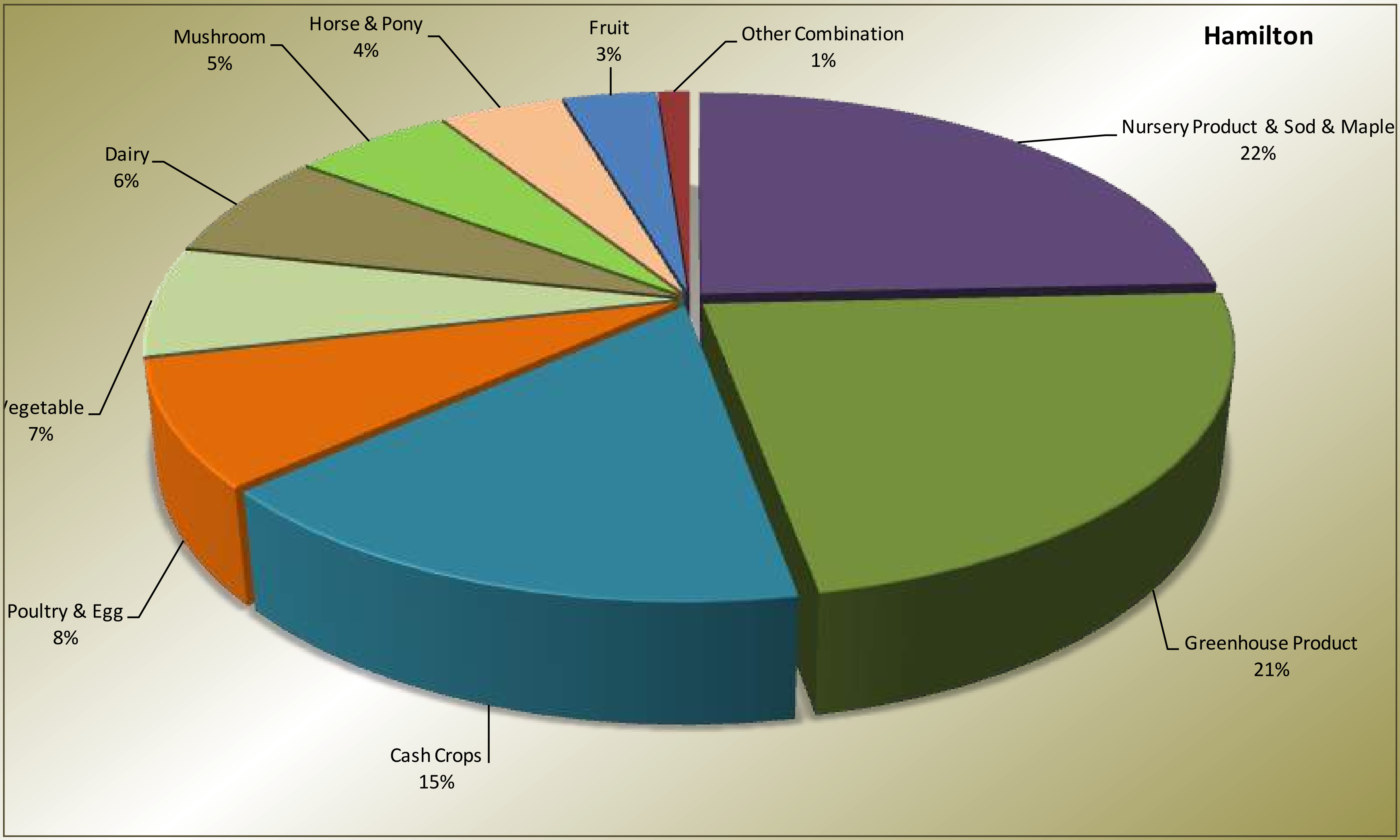

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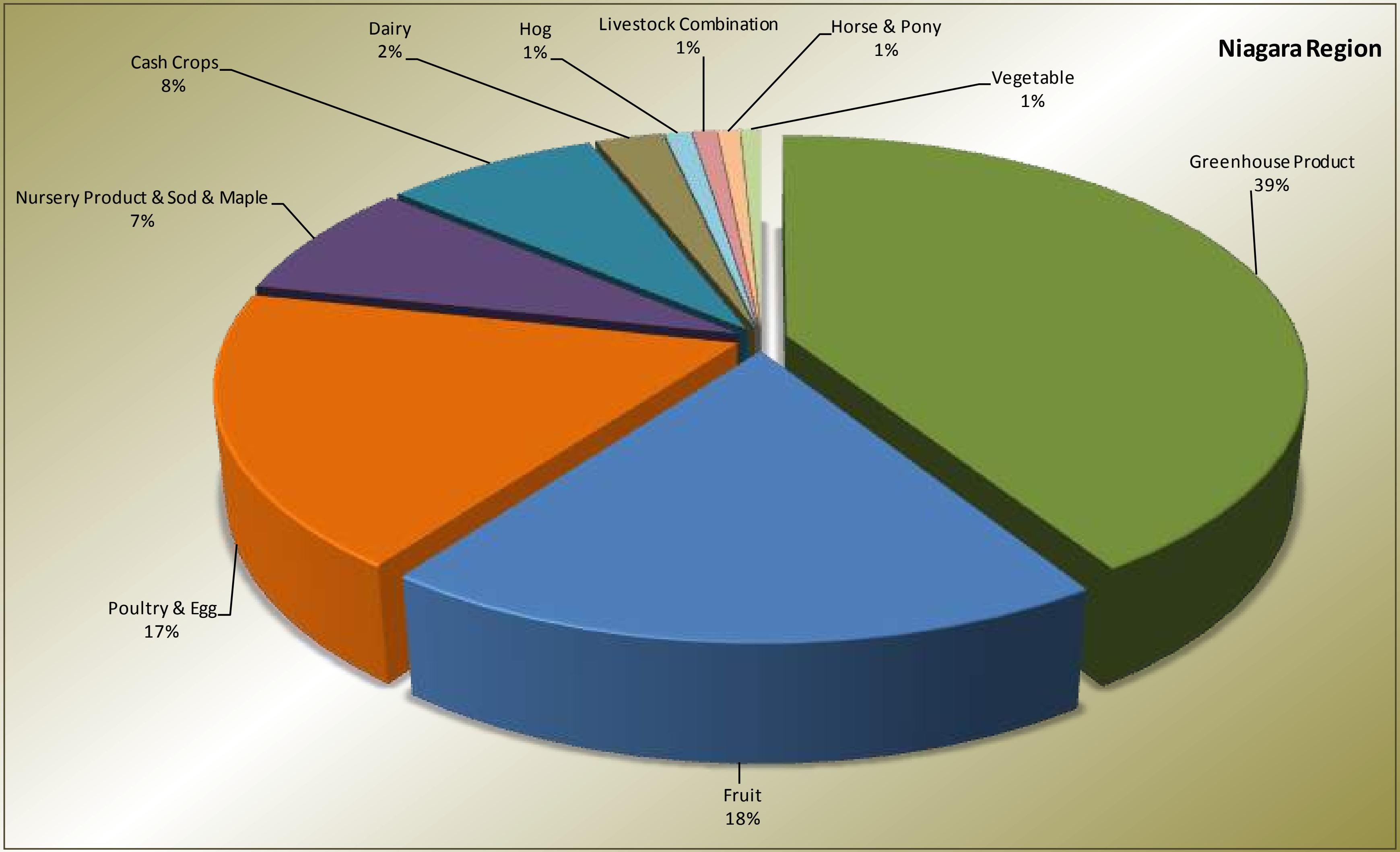

Change in Commodity Profile - $ and % Change

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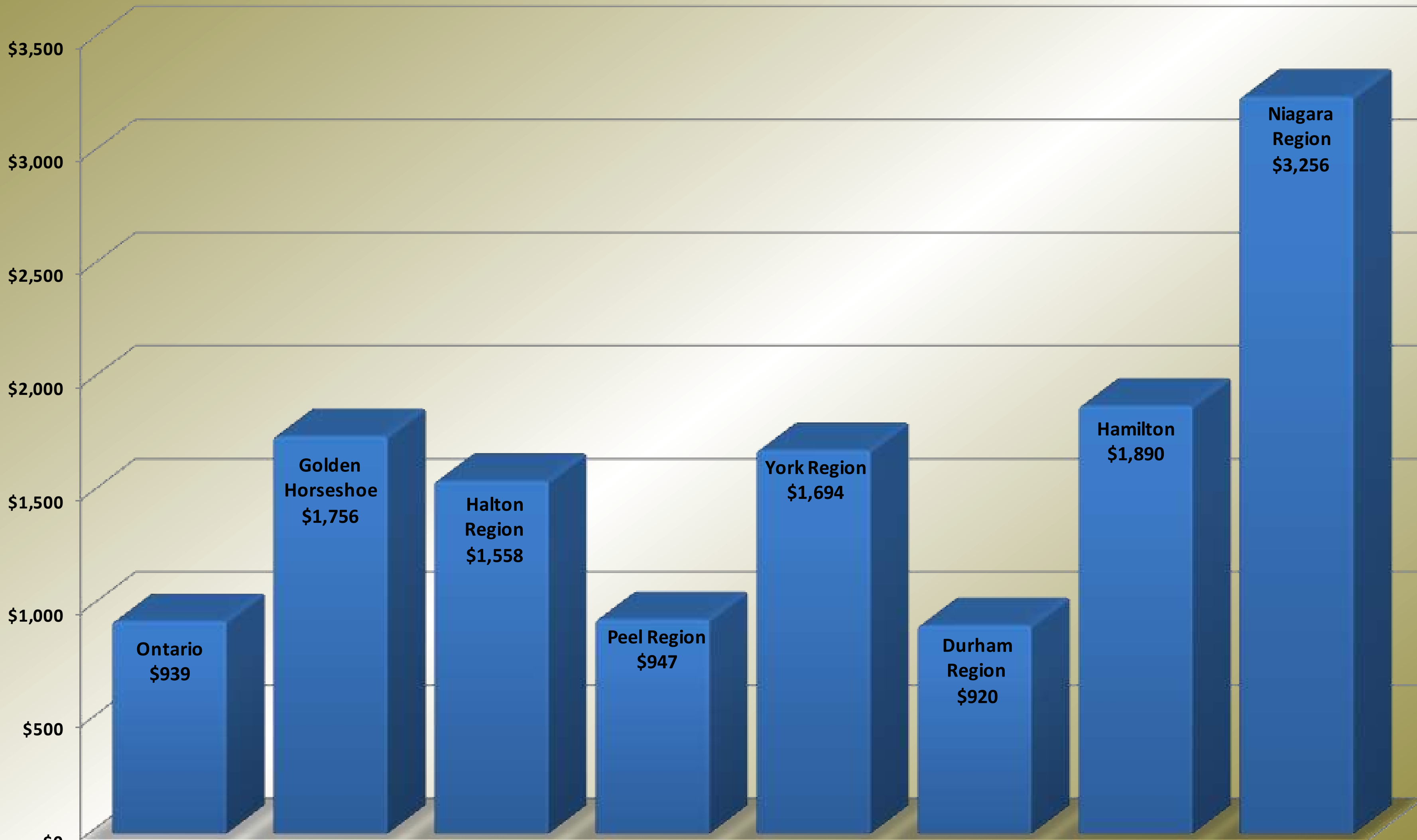
	Gross Farm Receipts ($)			Change ($)		Percentage Change	
Commodity	2001	2006	2011	2001 - 2006	2006 - 2011	2001 - 2006	2006 - 2011
Greenhouse Product	$324,196,969	$424,136,761	$424,088,772	$99,939,792	-$47,989	31%	0%
Nursery Product & Sod & Maple	$134,376,055	$159,847,859	$183,563,898	$25,471,804	$23,716,039	19%	15%
Poultry & Egg	$187,876,260	$187,858,633	$166,182,033	-$17,627	-$21,676,600	0%	-12%
Fruit	$126,448,288	$152,637,667	$159,750,554	$26,189,379	$7,112,887	21%	5%
Cash Crops	$106,959,530	$154,091,311	$248,733,186	$47,131,781	$94,641,875	44%	61%
Dairy	$128,476,497	$116,627,975	$108,956,699	-$11,848,522	-$7,671,276	-9%	-7%
Horse & Pony	$76,790,281	$97,612,449	$99,501,338	$20,822,168	$1,888,889	27%	2%
Vegetable	$58,754,677	$62,568,393	$79,020,825	$3,813,716	$16,452,432	6%	26%
Cattle	$80,138,610	$66,979,195	$41,443,639	-$13,159,415	-$25,535,556	-16%	-38%
Other Combination	$12,481,861	$41,736,051	$25,731,192	$29,254,190	-$16,004,859	234%	-38%
Mushroom	$34,170,266	$29,840,358	$23,719,535	-$4,329,908	-$6,120,823	-13%	-21%
Hog	$24,031,897	$24,787,472	$8,655,278	$755,575	-$16,132,194	3%	-65%
Livestock Combination	$14,747,292	$16,111,217	$15,578,805	$1,363,925	-$532,412	9%	-3%
Sheep	$1,841,319	$1,901,856	$3,917,252	$60,537	$2,015,396	3%	106%
Goat	$796,706	$1,089,459	$1,395,883	$292,753	$306,424	37%	28%
Other Livestock Specialty	$3,003,327	$4,307,336	$1,380,662	$1,304,009	-$2,926,674	43%	-68%
Fur	$1,517,107	$2,912,524	x	$1,395,417	x	92%	x
TOTAL	$1,404,601,683	$1,573,787,767	$1,716,206,729	$169,186,084	$142,418,962		

Share of Production

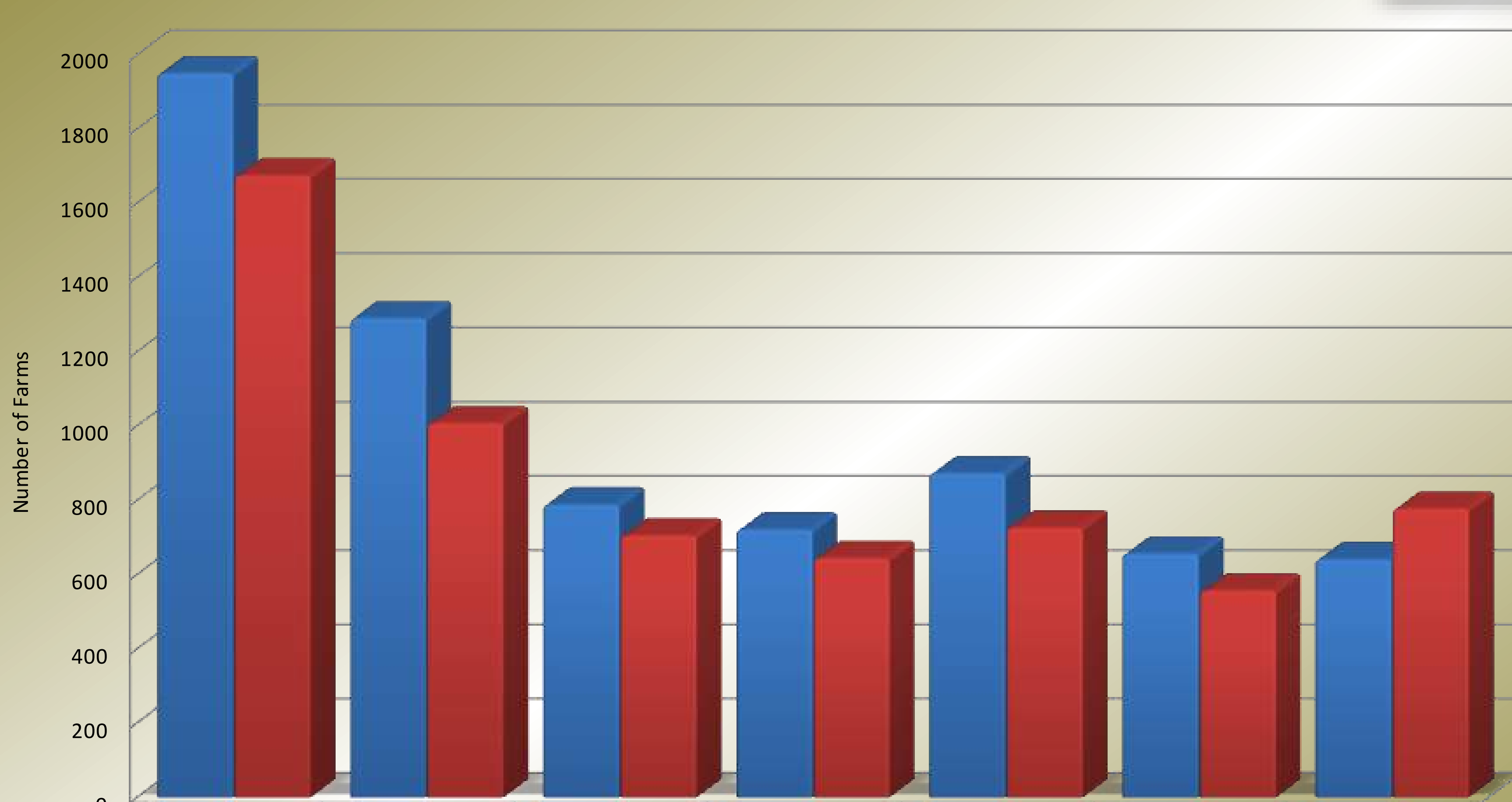
2011		Farmland Area			Gross Farm Receipts		
Geographic Location	Number of Farms	Acres	Average Size (Acres)	% of Total Provincial Area	Total ($)	Per Acre ($)	% of Total Provincial
Ontario	51,950	12,668,236	243		$11,890,835,395	$939	
Halton Region	469	79,567	170	1%	$123,942,913	$1,558	1%
Peel Region	440	93,843	213	1%	$88,856,378	$947	1%
York Region	828	153,559	185	1%	$260,121,662	$1,694	2%
Durham Region	1,454	297,012	204	2%	$273,237,098	$920	2%
Hamilton	885	130,589	148	1%	$244,217,225	$1,870	2%
Niagara Region	2,014	222,911	111	2%	$725,831,453	$3,256	6%
Golden Horseshoe	6,090	977,481	161	8%	$1,716,206,729	$1,756	14%

Gross Farm Receipts (GFRs) per Acre - 2011



Number of Farms by GFRs - 2011

Golden Horseshoe Food and Farming Alliance



	Under $10,000	$10,000 - $24,999	$25,000 - $49,999	$50,000 - $99,999	$100,000 - $249,999	$250,000 - $499,999	$500,000 +
2006	1950	1290	788	721	872	656	641
2011	1674	1007	705	644	726	557	777
	-276	**-283**	**-83**	**-77**	**-146**	**-99**	**136**

Farm Operating Costs

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Per Acre ($)

2011 - $1,527

2006 - $1,309

Ontario
2006 - $664
2011 - $787

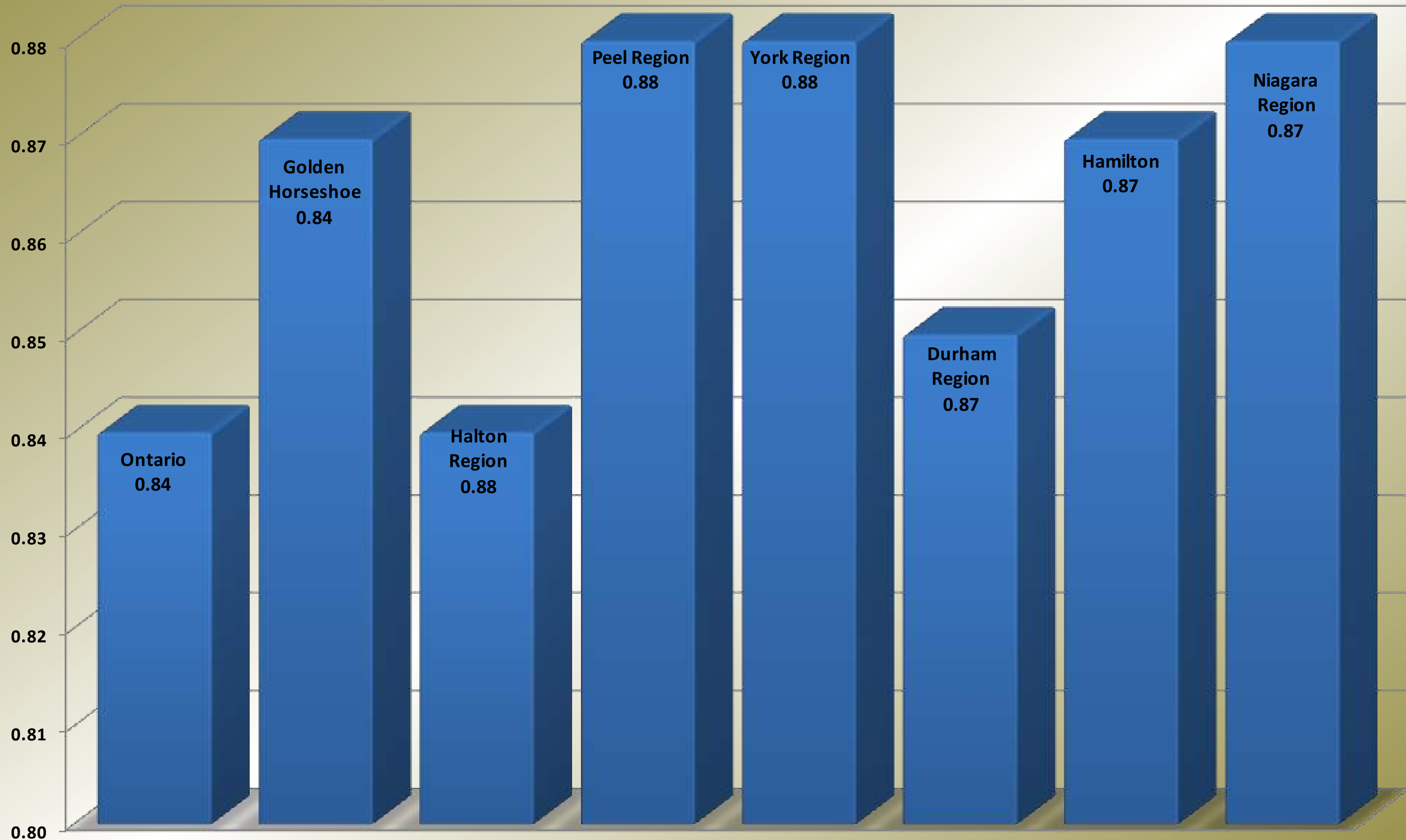
Per Farm ($)

2011 - $245,047

2006 - $197,360

Ontario
2006 - $154,584
2011 - $191,836

Ratio of Costs



Average Farm Capital (Millions)

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Halton Region

2001 – $1.6
2006 – $2.0
2011 – $3.2

Peel Region

2001 – $2.7
2006 – $3.9
2011 – $5.7

York Region

2001 – $2.0
2001 – $2.2
2011 – $2.9

Golden Horseshoe

2001 – $1.2
2006 – $1.6
2011 – $2.2

Durham Region

2001 – $0.9
2006 – $1.3
2011 – $1.8

Hamilton

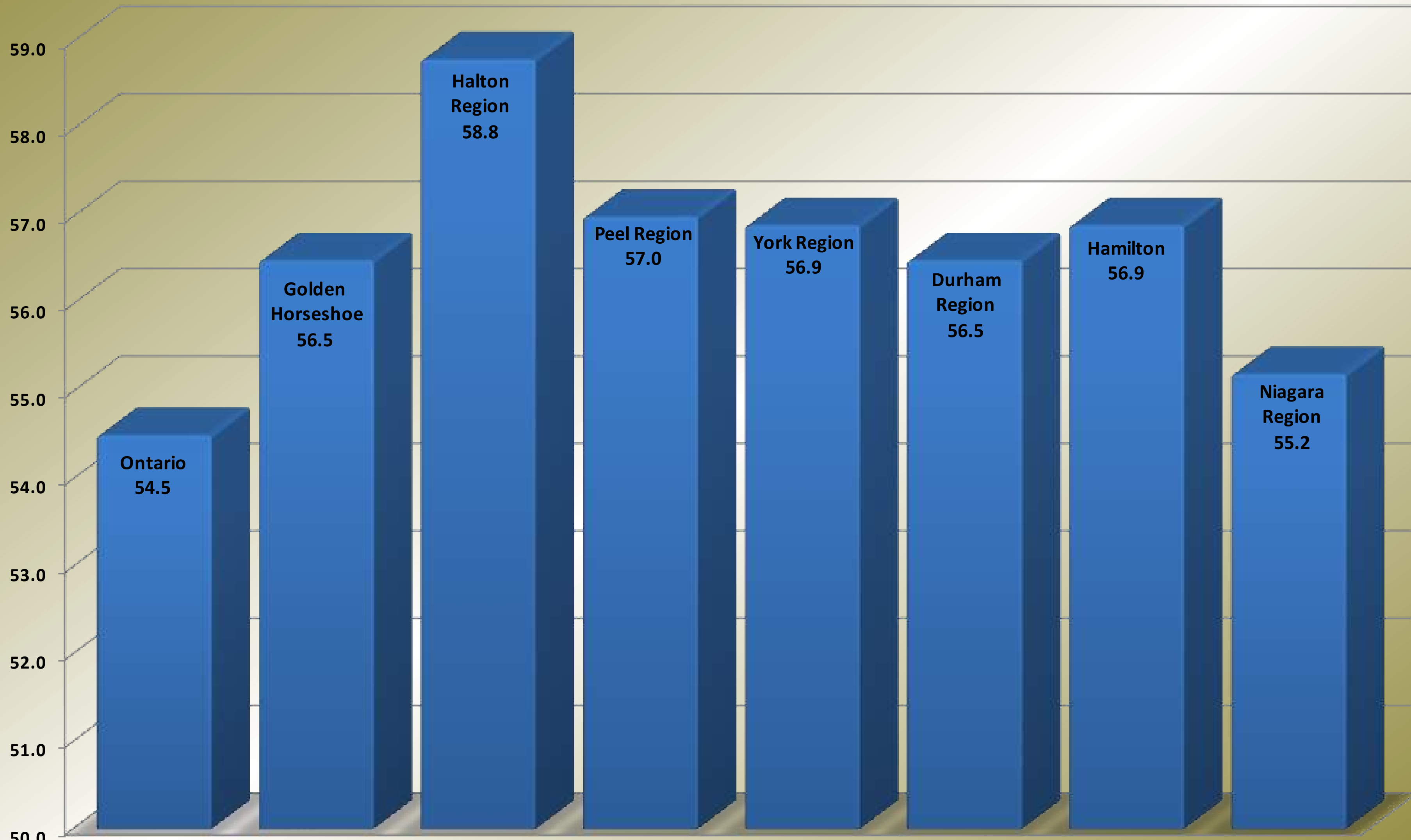
2001 – $0.8
2006 – $1.1
2011 – $1.6

Niagara Region

2001 – $0.8
2006 – $1.0
2011 – $1.4

Average Age of Farm Operators

Golden Horseshoe Food and Farming Alliance



Golden Horseshoe Food and Farming Alliance

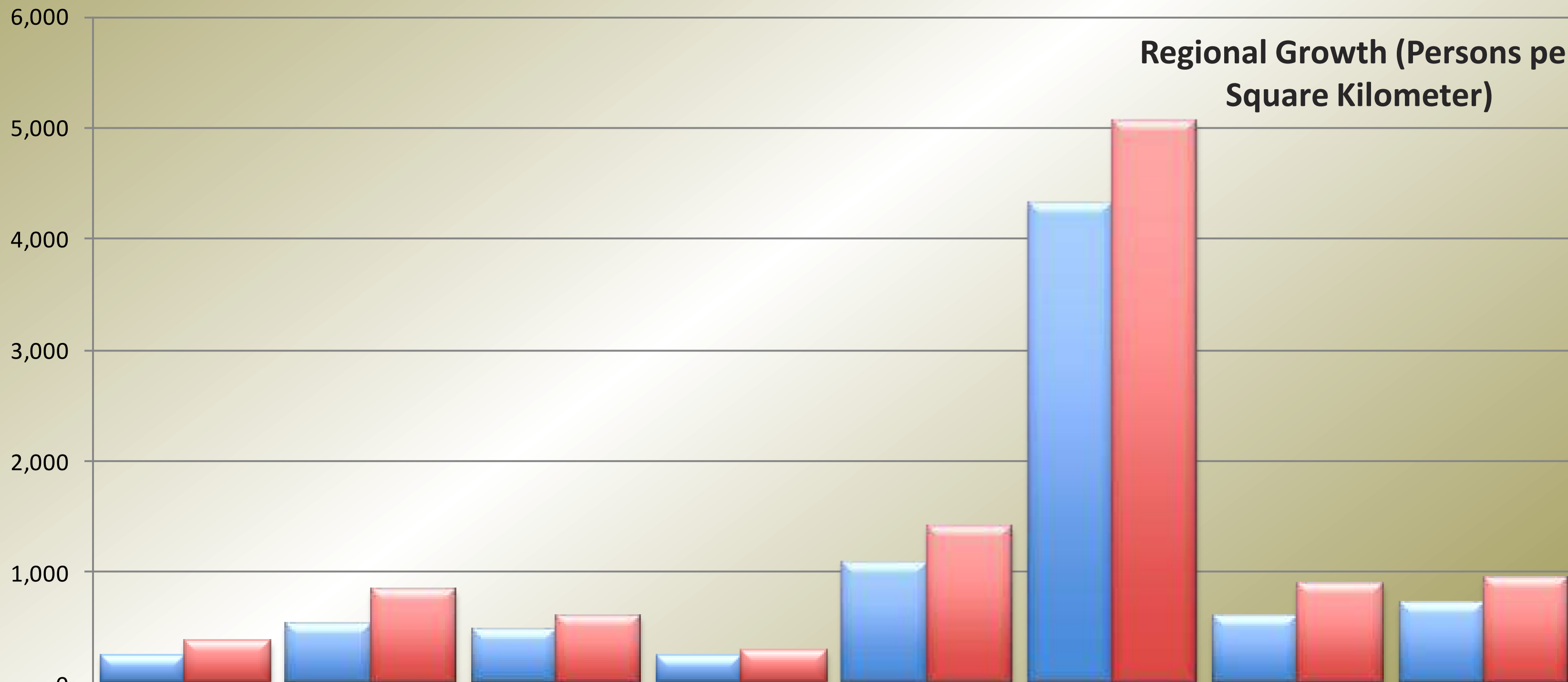
OTHER ISSUES

SOCIAL
ENVIRONMETAL
CULTURAL
DEMOGRAPHIC

Population Growth

2011 – 7.0 Million

2006 – 6.5 Million



	Durham	Halton	Hamilton	Niagara	Peel	Toronto	York	Total
2011	250	539	483	241	1,083	4,324	608	721
2031	384	845	611	293	1,416	5,067	899	946

Cultural & Social Trends & Issues

Demand – Side Trends

a)	General public's understanding of economics of farming, importance of farming and food systems to urban society (e.g. 'Farmers Feed Cities')	➔➘
b)	Demand for healthy and local foods (organic, GM-free, 100-mile radius, etc.) in stores and markets	➚➚
c)	Rise in popularity of niche restaurants (having access to their own farms, having preferred suppliers from within100-mile radius, etc.)	➚
d)	Perceived importance of food access and food security issues (food desert / food oasis concepts; the right to food)	➚
e)	Popularity of urban gardening (community gardens, container gardens, urban orchards, gardening on green roofs; etc.)	➚➚
f)	Demand for fresh, locally-produced food	➚➚

Supply – Side Trends

a)	Identification of 'Urban Agriculture' as topic area; professionalism of the field (books, courses, etc.)	➚➚
b)	Development of 'new industry' catering to desires of urban farmers	➚
c)	Popularity of agri-tourism, and demand for farm experiences	➔➚
d)	Agriculture incorporated into building design	➚
e)	Planning and regulatory policy that recognizes, responds to changing demand	➔➚

SWOT

Golden Horseshoe Food and Farming Alliance

SUCCESSES

Increase awareness and consideration about where food comes from

Cost of getting into farming prohibitive

Many new food processing, distribution & retail outlets, education programs (etc…) to look at local foods

- Reputation for safe food
- Wide diversity of products
- Productive land base
- Highly skilled workforce
- Proximity to markets
- New opportunity with growing world crops

- Increased Operating Costs
- Aging Farm Population
- Small Farm Size
- Lack of Knowledge about Agriculture
- Fragmentation & Conflicting Land Uses

BUT

Environmental Protection Regulations/Legislation/ Policy/Rules /Guidelines

Little data available on success of implementation/ ongoing monitoring

Agricultural Census Data Requirement Changing

CHALLENGES

Hard to Track Statistics in the Greenbelt

Increasing difficulty to compare & contrast previous years

SWOT

Golden Horseshoe Food and Farming Alliance

STRENGTHS

*Productive land base
*Unique micro climates
*Access to water
*Proximity to markets
*Highly skilled workforce
*Growth in high return commodities
*Transportation infrastructure
*Cluster of younger operators

WEAKNESSES

*Increasing urbanization
*Aging farm population
*Small farm size
*Public lack of knowledge about agriculture
*Lot fragmentation
*Expanding number of conflicting land uses
*Number and complexity of regulations
*Disjointed regulations
*Lack of rural infrastructure

OPPORTUNITIES

*Diverse and sophisticated market
*Diversity of commodity profile
*Farmland as essential part of natural heritage system
*Educational cluster to support agriculture
*Link to international markets
*Canadian reputation for safe food
*Associated with largest food processing cluster in North America
*World leader in agriculture
*Opportunity for systems approach

THREATS

*Capital cost of entering farming
*Land prices
*Fragmentation
*Limited access to capital
*Uncertainty about future
*Government decisions impacting agriculture (racetracks)
*Changes to census reporting
*Operating costs
*Loss of farm services
*Urban Services (Road Salt)

Golden Horseshoe Agriculture & Agri-Food Strategy

Food & Farming: An Action Plan 2021