Analysis & Summary of the Land Between's Agricultural System Data, Relative to Greater Ontario

Data-based foundation of the Feeding the Land Between Project

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2022

State of agriculture

The world, Canada and Ontario

Global agriculture

Climate change, supply chain issues and changes in farming dynamics

All around the world farmers are experiencing changes in weather patterns, such as increased instance of drought, which often negatively effect yield. Combined with globalized supply chains which are under massive corporate control and low rates of young people choosing to enter the agriculture sector, global food security is under threat.

Canadian agriculture

What is happening in Canada?

Canadian agriculture has become dominated by highly profitable cash cropping. Typically very little quantity of cash crops is directly used for human consumption within Canada/Ontario. Canada relies heavily of food imports, and is not a food sovereign nation. This makes Canada susceptible to trade disruptions, as was seen with the COVID-19 pandemic when food prices, like that of meat, greatly increased. Within Canada itself, 70% of food retail sales are controlled by only three companies: Empire Company Limited (Sobeys), Loblaw Company Limited and Metro.

Ontario's agriculture

What is happening in Ontario?

Ontario has some of the most fertile land in Canada, yet is dominated by cash crop production, much of which is destined for export. Southern Ontario is responsible for nearly all of Ontario's agriculture, however development has caused large amounts of farmland loss every year. Drastic reductions in the number of beef and dairy farms have been observed throughout the province.

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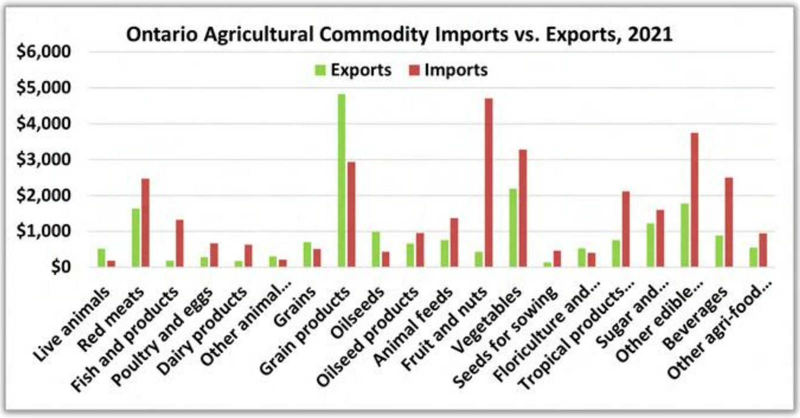
Ontario's Agriculture

What is happening in Ontario?

Ontario is a net exporter of:

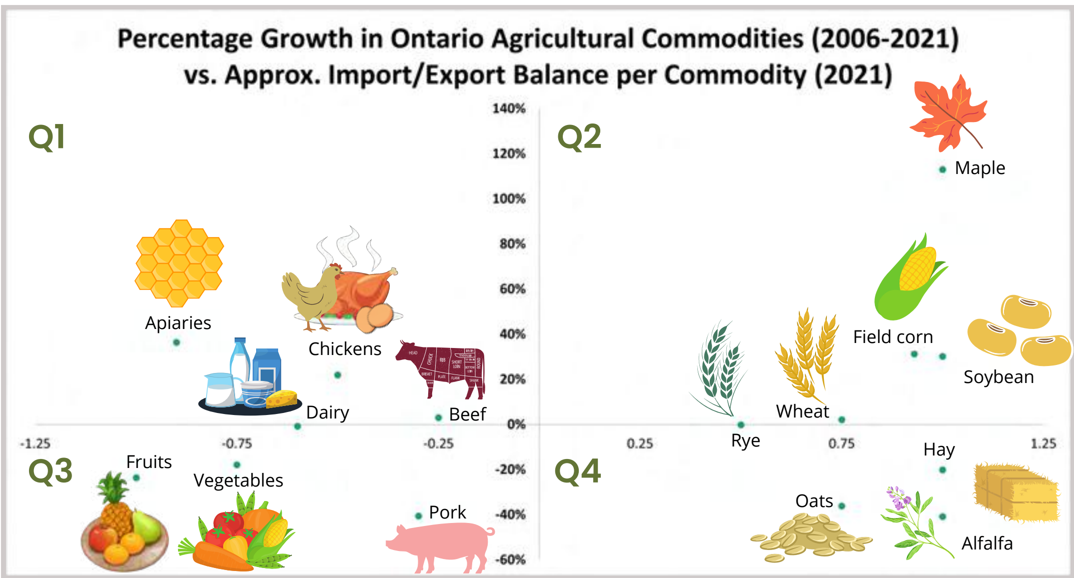
live animals, other animal products, grain, grain products, oilseed, and floriculture/nursery products

Ontario was a **net importer** of all other agricultural commodities in 2021



Exporting cash crops & importing human food

Field corn, wheat, rye, soybean, hay and alfalfa are cash crops that Ontario heavily exports. In addition, Ontario also exports live animals and then imports end-product version of those goods (such as cuts of beef, chicken and pork), which are the products that allow for added-value creation and full profit capture within the product lifecycle and food system supply chain. Ontario is a net importer of the majority of commodities intended for human consumption.



Q1: Net import products, with increasing domestic production
Q2: Net export products, with increasing domestic production
Q3: Net import products, with decreasing domestic production
Q4: Net export products, with decreasing domestic production

Our analysis of the state of the Land Between (TLB) agriculture

History, concerns, losses, trends and finance

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Table of Contents

What we will be discussing

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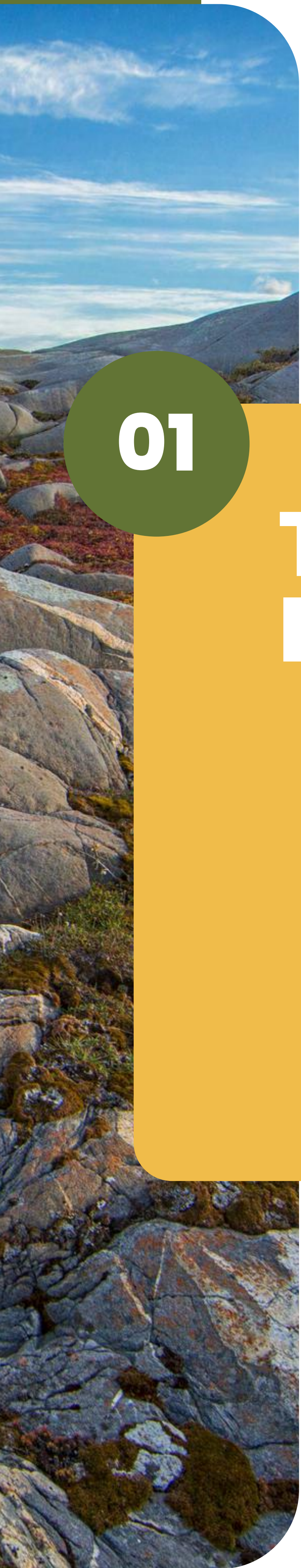
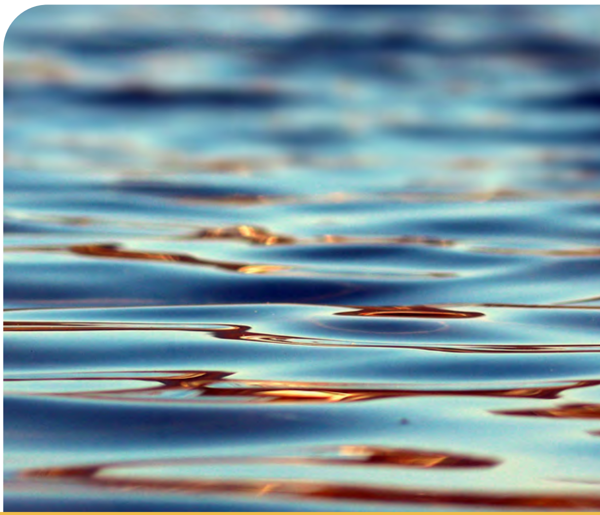




01

The Land Between Region

- What is TLB? Why is it special?
- Where is TLB
- Geology and composition
- Why it is important?
- History of the region
- Sources of the data used for our analysis

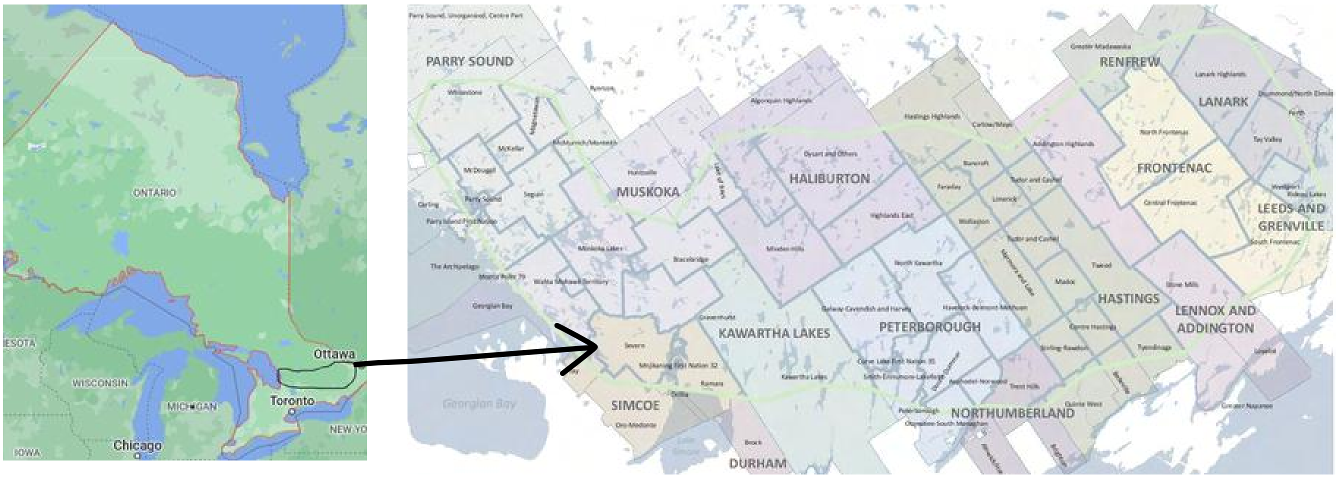
What is TLB region and why is it special?

A incredibly important landscape

Where is The Land Between?

Ontario's cottage country

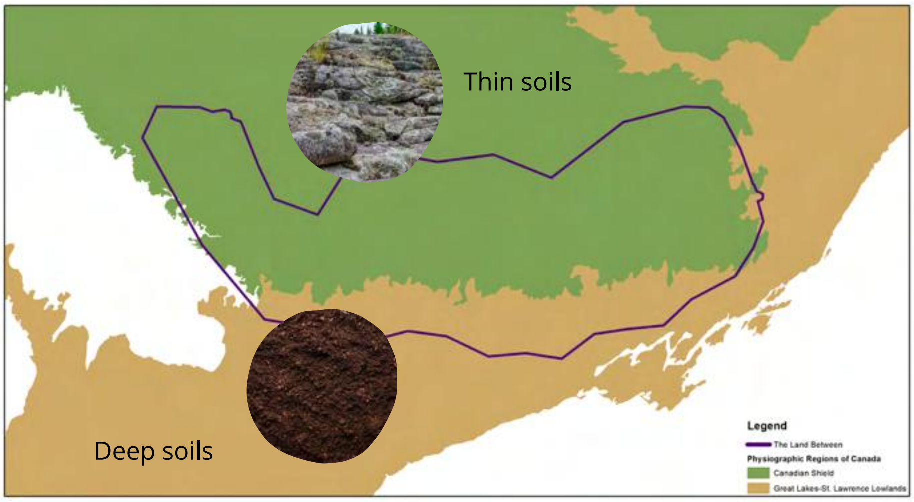
The Land Between, also known as Ontario's cottage country, has its southern border around Kawartha Lakes and Peterborough, and its northern points at Parry Sound through Haliburton and east to Renfrew.



Special geology of TLB

The meeting place of the Canadian Shield and the St. Lawrence Lowlands

TLB is geologically unique because it is the meeting place of the fertile St. Lawrence lowlands in the south and the Canadian shield to the north. This meeting provides a unique agricultural landscape across the region.



What is TLB region and why is it special?

A incredibly important landscape

TLB geology gives rise to unique characteristics

The region's rare geology and geography give rise to special ecosystem services, habitats and refuges

TLB still has *healthy ecosystems*

This allows the region to preform vital ecosystem services that are essential to greater southern Ontario. When ecosystem services stop functioning, they are extremely expensive to replace with human infrastructure.

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TLB farming history

A long legacy

Impact of geography

Relatively low quality soils meant settlers had to adapt new forms of agriculture

TLB is not all flat fields and fertile soil, but its population has long managed to survive and thrive. The farmland of TLB is not conducive to the industrialized, export-oriented agricultural standards of high-input, cash-crop, monoculture farming, seen for many decades as the way to maximize profit in the farming hotbeds of southern Ontario.

Culture of resilience

Thin soils and dynamic landscapes necessitated learning new means of survival

History of TLB and its people forms a foundation of knowledge and tradition to facilitate agricultural innovation. Adaptation of traditional agricultural practices to suit current conditions helped to create a culture of adaptability, resilience and entrepreneurial spirit.

Legacy of beef and dairy

Historically, TLB's agricultural industry has focused on all things beef and dairy

Some cattle breeds are ideal for the landscape and climate of TLB, and much of TLB farmland is suited to pasture. The level of intensification required to compete on the same playing field as multinational corporations has reduced the extensive nature of TLB's cattle/dairy farms, but beef cattle is still a major part of TLB's agricultural economy, and prominent dairies remain (Kawartha, Central Smith).

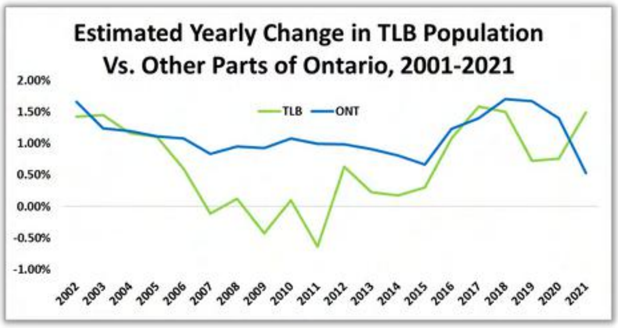
Major changes happening in TLB

A changing Ontario

Population is increasing

The population of the TLB is rising faster than the rest of Ontario

As we saw with the COIVD-19 pandemic and the rise of remote work, people are leaving urban centres at an increasing rate.



Development is increasing

More buildings, cottages and roads

Development in TLB has greatly increased over the last several years, especially since COVID-19. Many people are leaving the GTA and exploring alternative locations to live, and vacation, in TLB's cottage country. These new residents are changing the landscape and causing high levels of development, especially along the shores of lakes and rivers.

Food security concens & gardening are increasing

TLB residents are taking matters into their own hands

COVID-19 has shown many people the fragility of supply chains and the impact of increased food costs. In response, residents of TLB have reported combating food insecurity through increased utilization of backyard food gardens and chest freezers.

Our sources of data

Where our statistics came from

Sources of data

Canadian Census + Farmer Interviews

Canadian census data from 2006-2021 was provided by the Government of Canada through public databases, while some 2001 data was accessed via custom-run Stats Canada tables. This information was used to inform the bulk of our analysis, along side primary source farmer interviews and data visualizations created/conducted by our researcher (Joel Sloggett)

Years analyzed
2001-2021

FIVE

Census period

Canadian Census year were
2001, 2006, 2011, 2016, 2021

Census consolidated subdivision (CCS)

Census subdivisions in the Land Between

Census Division	Census Consolidated Subdivision	Geographical Identification	Census Division	Census Consolidated Subdivision	Geographical Identification
43	15	Severn	44	2	Gravenhurst
43	19	Ramara	44	18	Bracebridge
12	1	Tyendinaga	44	53	Muskoka Lakes
12	20	Stirling-Rawdon	44	65	Georgian Bay
12	26	Centre Hastings	46	5	Highlands East
12	30	Tweed	46	15	Minden Hills
12	36	Madoc	49	3	Seguin
12	46	Marmora and Lake	49	39	Whitestone
12	61	Bancroft	49	43	Magnetawan
12	65	Carlow/Mayo	7	40	Rideau Lakes
12	76	Hastings Highlands	9	15	Tay Valley
14	45	Trent Hills	9	39	Lanark Highlands
15	3	Asphodel-Norwood	10	20	South Frontenac
15	15	Selwyn	10	35	Central Frontenac
15	23	Douro-Dummer	10	45	North Frontenac
15	30	Havelock-Belmont-Methuen	11	30	Stone Mills
15	44	Trent Lakes	11	35	Addington Highlands
16	10	Kawartha Lakes	47	8	Greater Madawaska

Our sources of data

Where our statistics came from

Census categories analyzed

Census categories were grouped into 6 major themes

Farmer Demographics

- Age of Farmers/Farm Operators
- Male and Female Farm Operators
- Off-Farm Employment
- TLB Farm Operator Residence
- Hours Per Week Farming

Fruits, Vegetables & Organics

- Fruit Crops
- Vegetable Crops
- Greenhouse Vegetables & Mushrooms
- Organics Production

Farming Business

- Operating Arrangement
- Succession Planning
- Direct Marketing
- Employees On-farm
- Total Farm Capital
- Gross Farm Receipts
- Farm Operating Revenue
- Farm Operating Expenses

Farm Characteristics

- Farm Types
- Land Use
- Total Area of Farms
- Total Area in Crops
- Renewable Energy Production
- Land Tenure

Livestock

- Cattle
- Poultry
- Pigs
- Sheep and Lambs
- Other Livestock

Other Agriculture

- Hay and Field Crops
- Pasture
- Apiculture
- Maple Syrup

Key takeaways from our research

Summary of our research findings

1. TLB is losing farmland, farmers and farm employees at an alarming rate

2. TLB's historically dominant farm types of dairy, beef and hay are seeing dramatic decreases

3. Livestock farms are decreasing, but animal numbers per farm are intensifying

4. Cash/export-oriented crops are becoming more prevalent

5. Vegetable & fruit growing, greenhouses, mushrooms & organic products are becoming more popular

6. It is significantly cheaper to own and operate a farm in TLB compared to the rest of Ontario

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02

Significant concerns

- Succession planning
- Farm type classification
- Land tenure

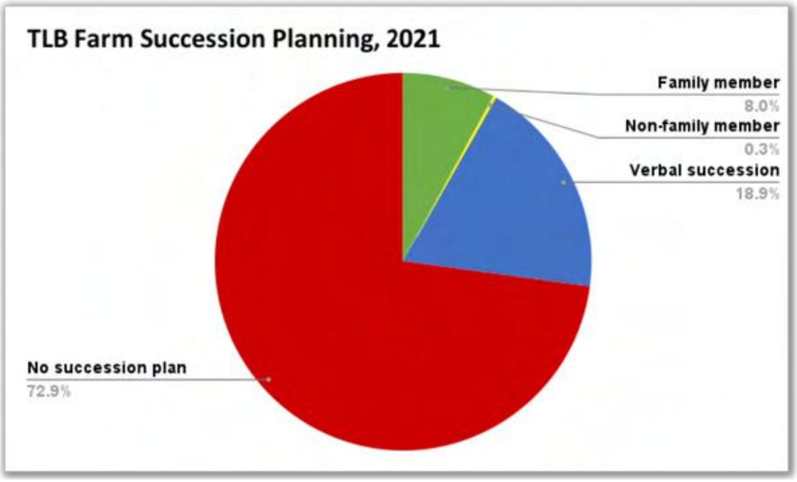
Significant concerns

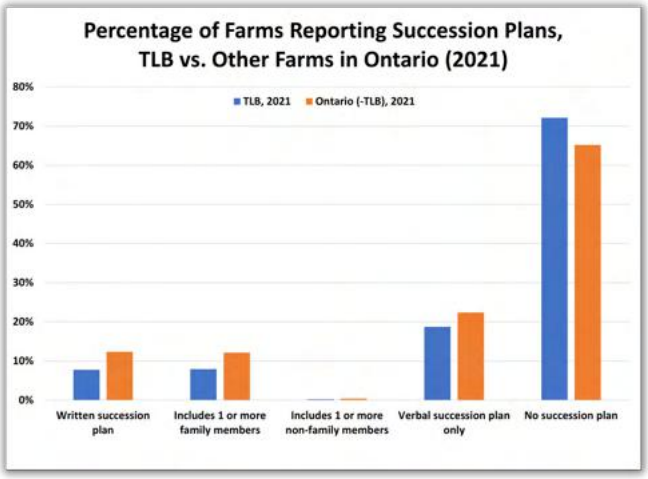
Succession planning

Few Succession Plans

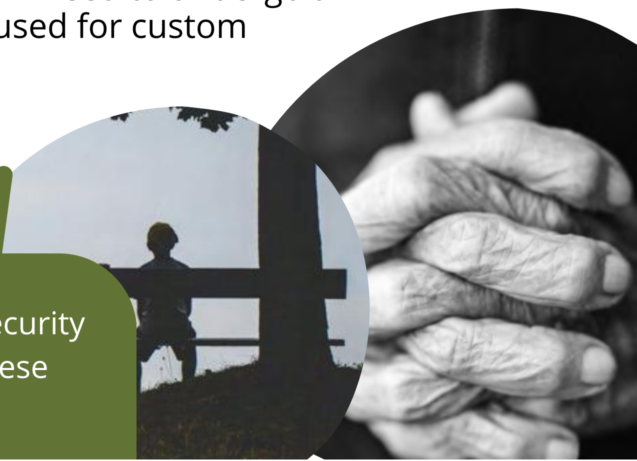
Significantly low percentage of farms have succession plans

In 2021 ***73%*** of TLB farms had ***<u>NO</u> verbal or written succession plan,*** compared to 65% for farms in the rest of Ontario





Over 60% of farms in TLB are sole proprietorships (owned by one person). When these farmers retire, their farms will need to undergo a transfer of ownership to new owners, be rented/used for custom farming or removed from agriculture.



What will happen to food security and farmland when all these farmers retire...

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Significant concerns

Succession planning

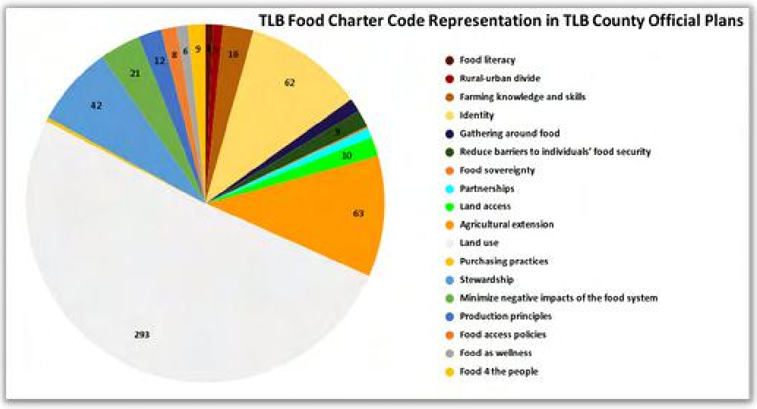
Concerns for neighbours succession plans

Farmers are reporting growing concerns about the integrity of farming communities

Farmers are concerned about the succession plans of their neighbours, changes of ownership and new usages of surrounding farmland

Succession Planning in Policy

Simcoe is the only TLB county to mention agricultural succession planning in their regional food charter



In 2021, ***no TLB regions*** reference agricultural succession planning in their official plans

Impact: Severn doubled its number of farms with written succession plans (2016-2021), 4th largest growth in TLB, and (new in 2021), 4th most farms with verbal succession plans

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Significant concerns

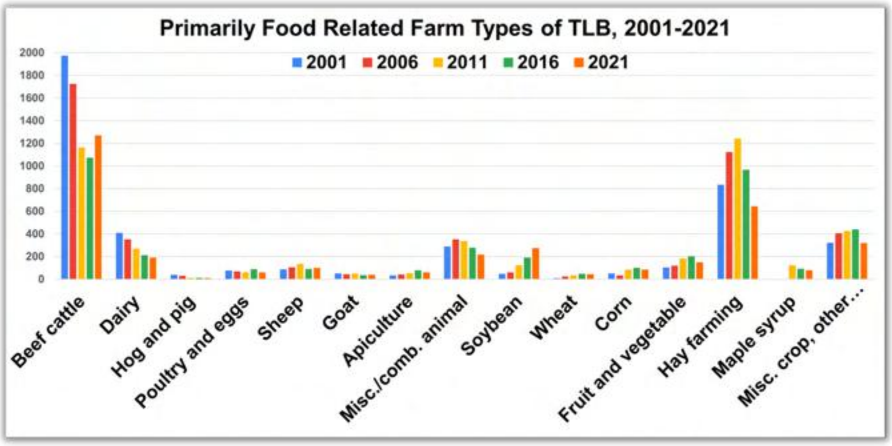
Farm type classification

More cash crop farms

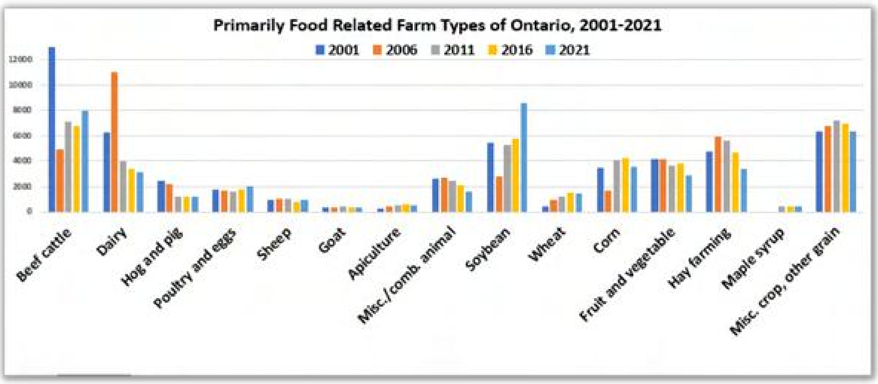
Increase in cash crop farms in TLB, & percentage of TLB crop acreage devoted to cash crops

From 2006-2021 TLB farms were ***increasingly likely to be classified as soy, wheat or field corn*** farms

Ontario versus TLB



Beef cattle and Hay farms are still the most common farm classifications in TLB, but they have seen significant decline



Increase in cash crop farms in Ontario, & growth in beef cattle farms (post-BSE outbreaks in 2003)

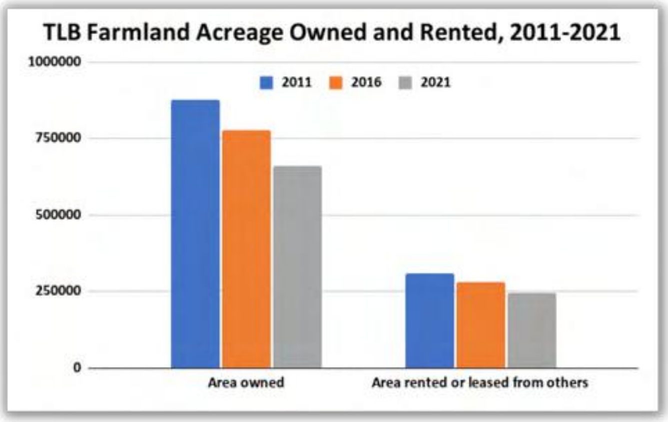
Significant concerns

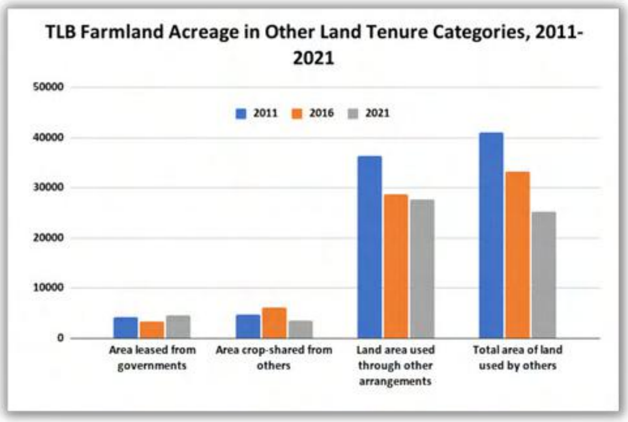
Farmland Tenure

Farmland acreage in nearly all tenure categories is decreasing

Farmland leased from the government was the only tenure category to grow in TLB between 2016 and 2021

21% decrease in ***farms owned*** and ***25% decrease in acres owned*** from 2011-2021





In 2011, the number of farms in TLB owned by the operator was 4,684, but in 2021 this had dropped to 3,715. Amount of farmland acres owned in 2011 was 877,694 versus 659,650 acres in 2021.

03

Significant losses

- Young farmers
- Farm operators & employees
- Farmland
- Alfalfa, hay, pasture
- Oats
- Beef and dairy
- Poultry and other livestock
- Apiaries
- Maple syrup farms

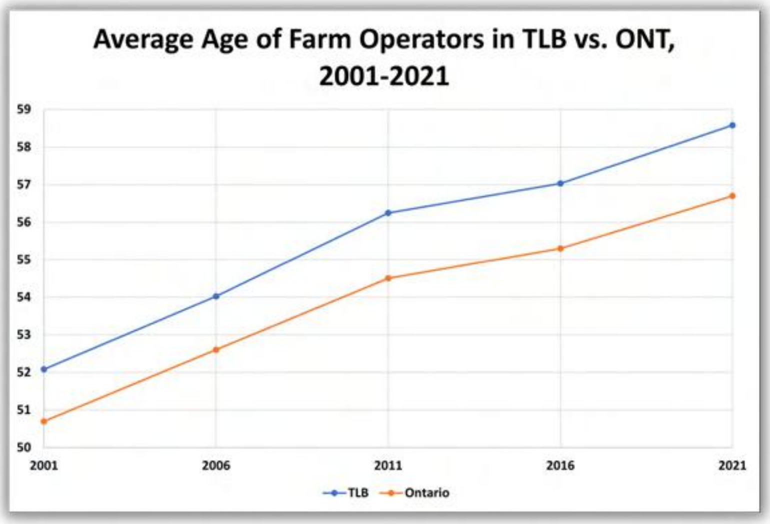
Significant losses

Young farmers

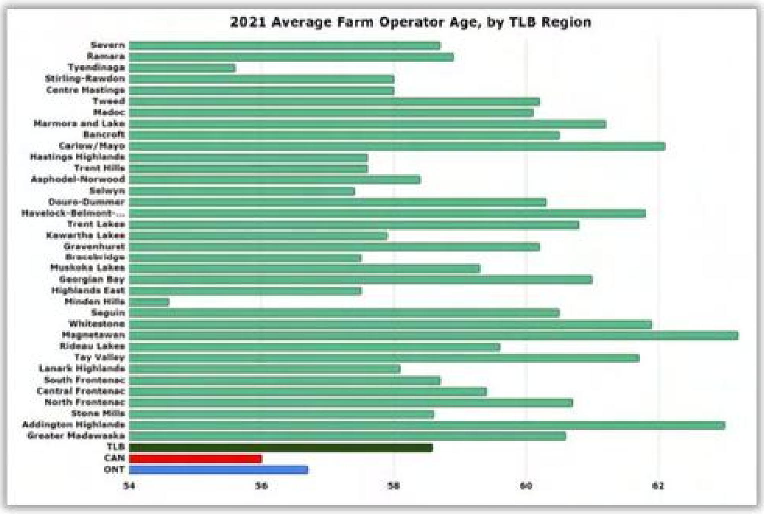
Young Farmers

Significant losses in the number of young farmers

TLB farming population is ***aging faster*** than the rest of Ontario. ***67.8%*** of TLB farm operators (managers) were ***55+ years old in 2021***



In 2021, the average farmer in TLB was almost 59 years old, while in Ontario overall the average farmer was under 57 years of age



The average age of farmers is 59+ in 20 of 36 TLB regions. Minden Hills and Tyendinaga had the lowest average age (<56)

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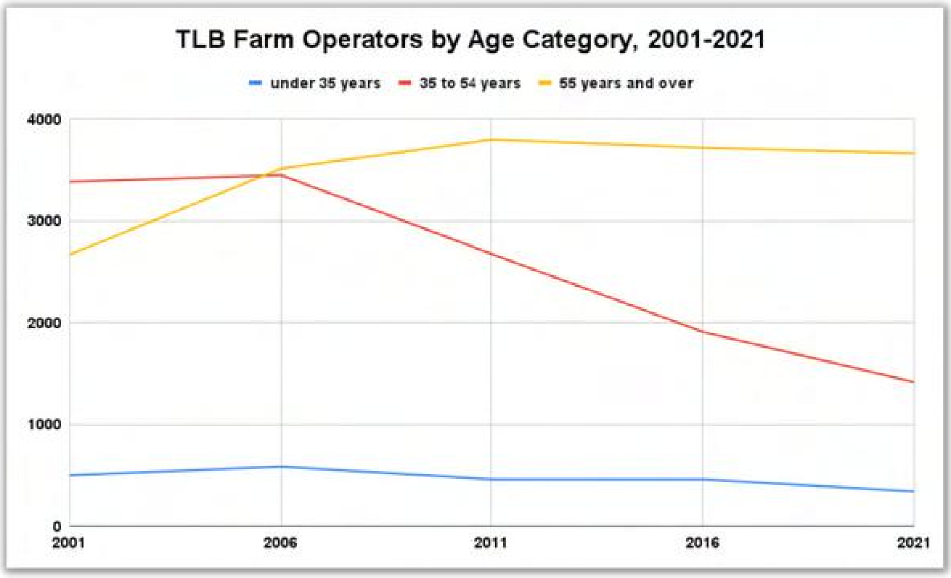
Significant losses

Young farmers

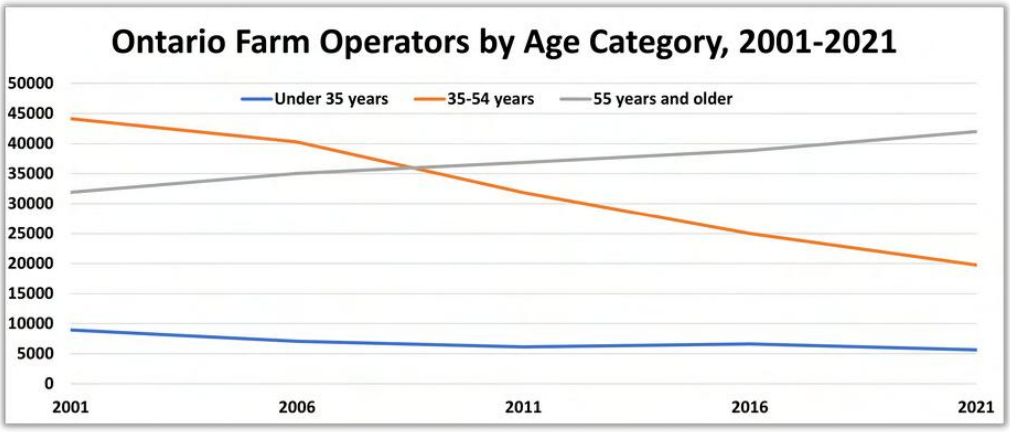
Young Farmers

Significant losses in the number of young and middle-aged farmers

Ontario versus TLB



The amount of middle aged farmers (35-54 years) sharply declined from 2006-2021



Similar, but slightly less dramatic changes in farmer age have been seen across Ontario

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Significant losses

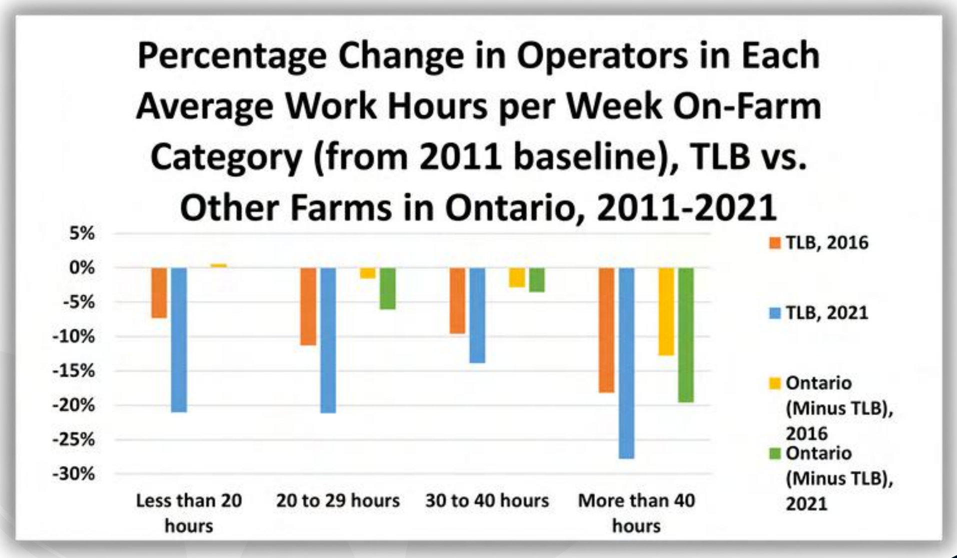
Farm operators

Losses in part-time farm operators

Significant losses in part-time farm operators

TLB accounted for 75% of the provincial decline in operators working <20hrs per week from 2016 to 2021

TLB had a decline of 6 times as many farmers working less than 20 hours per week as the province gained, from 2011 to 2016.



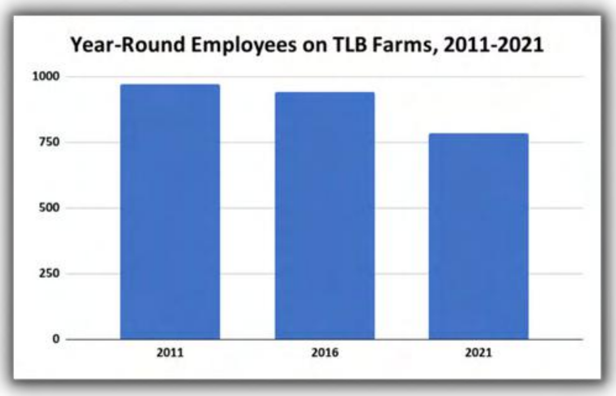
Significant losses

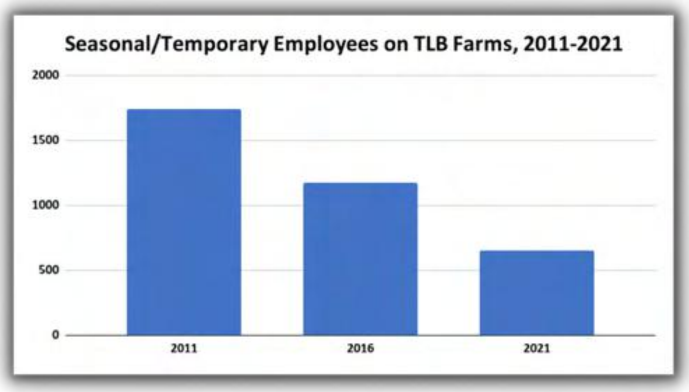
Farm employees

Decrease in the number of farm employees

Greatest losses have been in temporary employees

72% decrease in the number of farms reporting employees and a ***47% decrease*** in the total number of employees from 2011-2021





The number of farms reporting employees decreased from 949 in 2011 to 266 in 2021. In this time, the total number of employees dropped from 2,717 to 1,439.

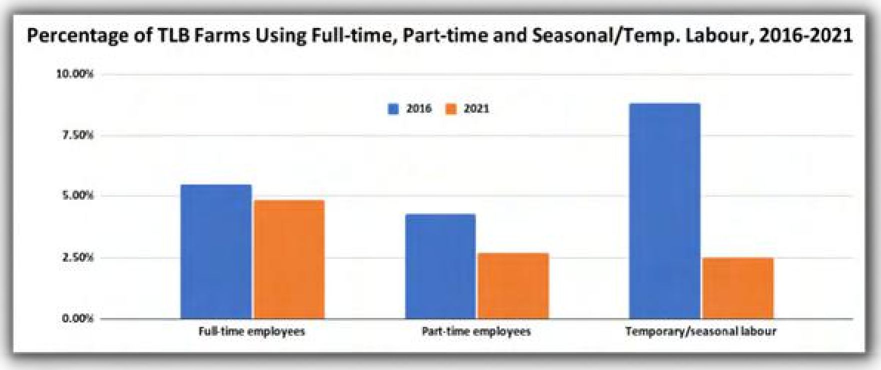
Significant losses

Farm employees

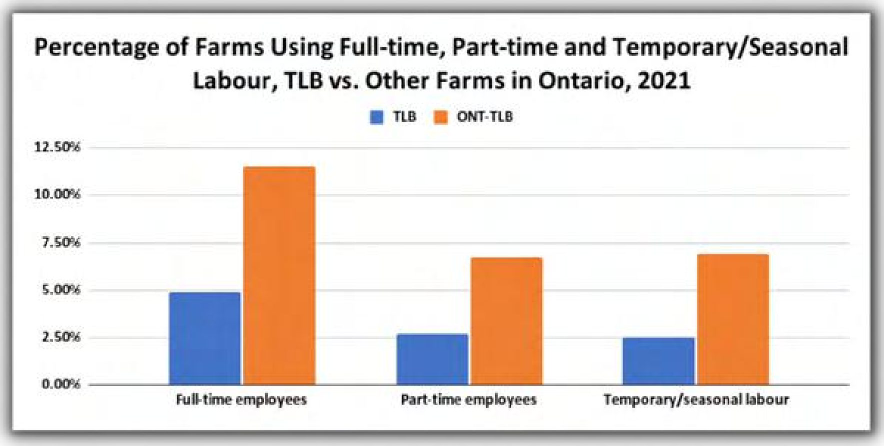
Decrease in the number of farm employees

Greatest losses have been temporary employees

The decline in seasonal and temporary agricultural labourers in TLB has been much greater than the relative decline for other farms in Ontario



Ontario versus TLB



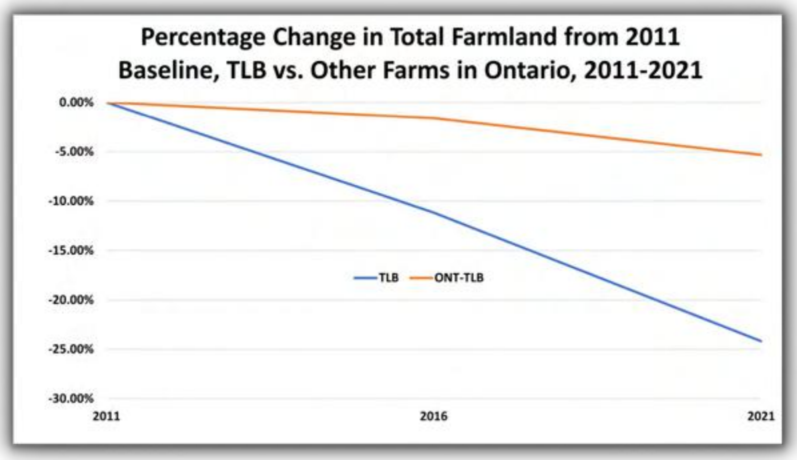
Significant losses

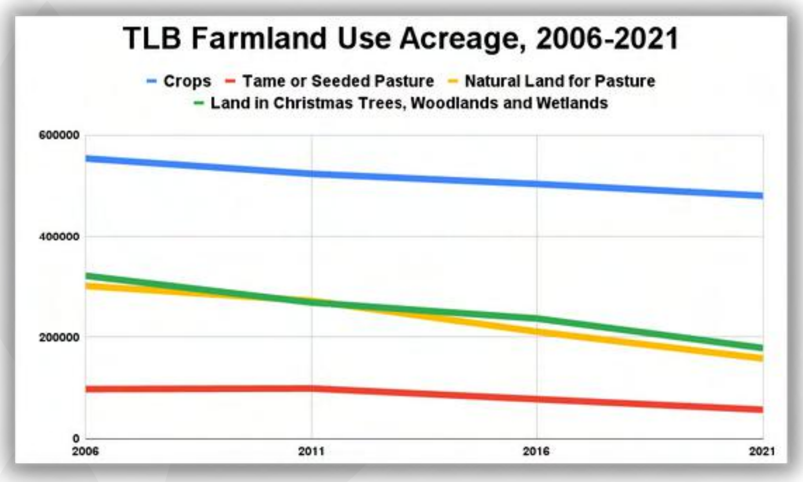
Farmland & area in crops

Losses in total acres of farmland

Farmland is being transitioned to other uses

24% decrease in TLB *farmland* from 2011 to 2021





Total TLB farmland decreased from 1,215,535 acres in 2011, to 921,788 acres in 2021.

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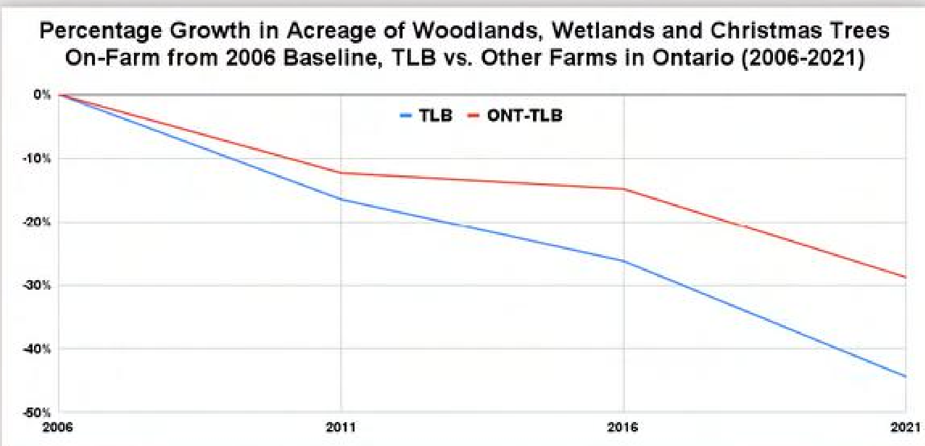
Significant losses

Farmland & area in crops

Losses in total acres of farmland

Significant losses in acres of farmland classified as woodland and/or wetlands

Decrease from ***17% to 14%*** of ***Ontario's on-farm woodlands and wetlands*** from 2006 to 2021



In 2021, TLB contained only 7.8% of Ontario's farmland, but had 14% of woodlands and wetlands on-farm for the province. In total, woodlands and wetlands account for 19% of farmland in TLB.

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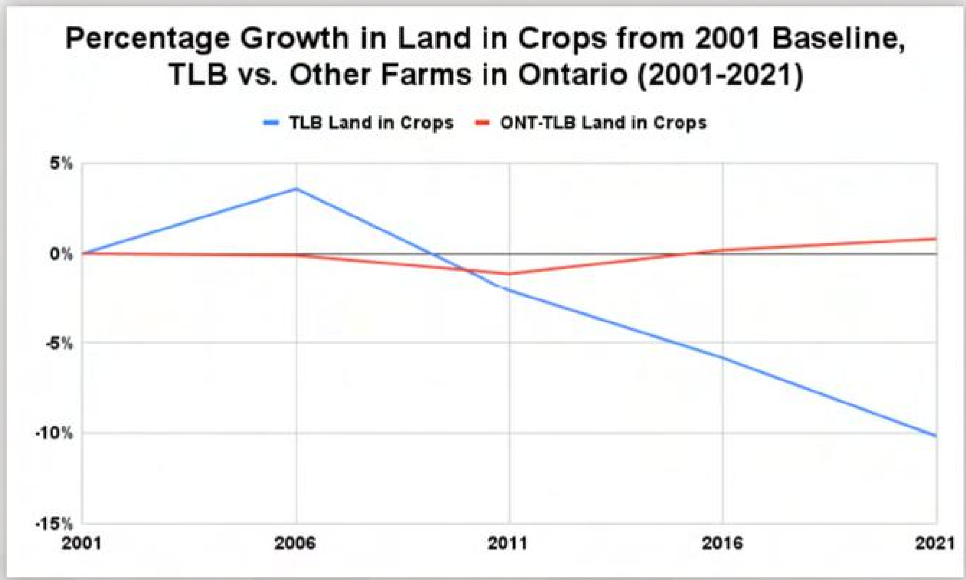
Significant losses

Farmland & area in crops

Losses in area in crops

Farmland is being transitioned to other uses

14% <u>decrease</u> in TLB ***area in crops*** from 2011 to 2021, which is equivalent to ***53,000 football fields***



TLB decreased from 550,000 acres of crops to 480,000 from 2011 to 2021. However, TLB still accounts for 5.3% of Ontario's area in crops.

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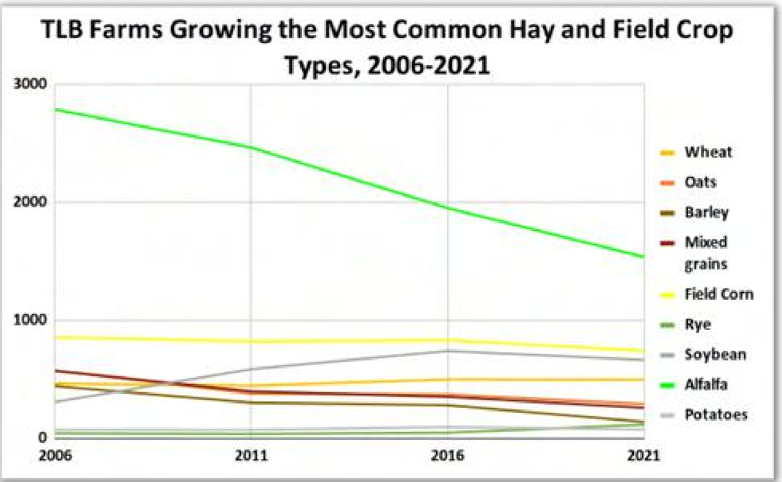
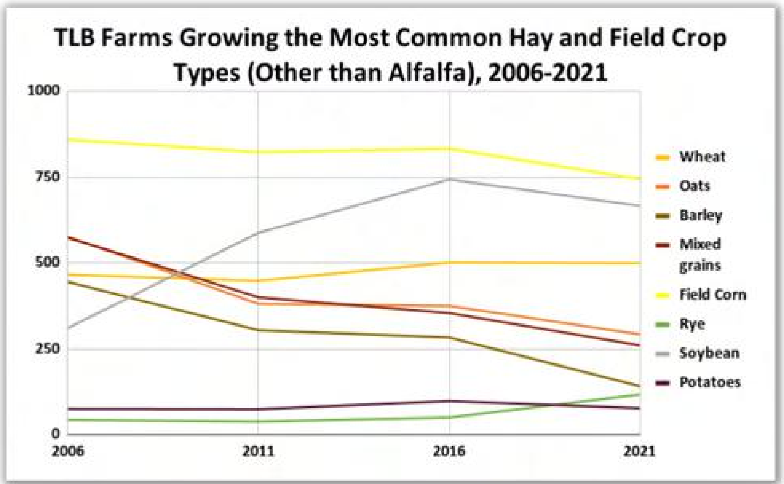
Significant losses

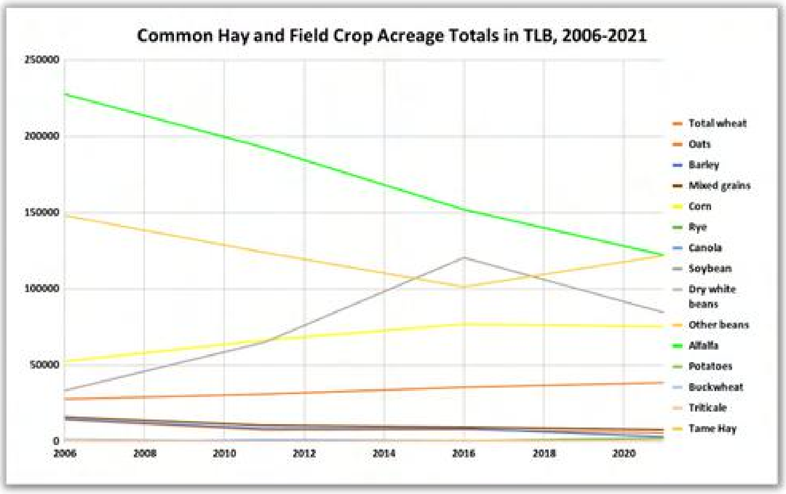
Alfalfa, natural pasture and hay

Hay and field crop summary

Large declines have occurred in the number of hay and several field crop farms. These declines have been the most dramatic for hay. Many field crops have also seen significant declines in their total acreage.







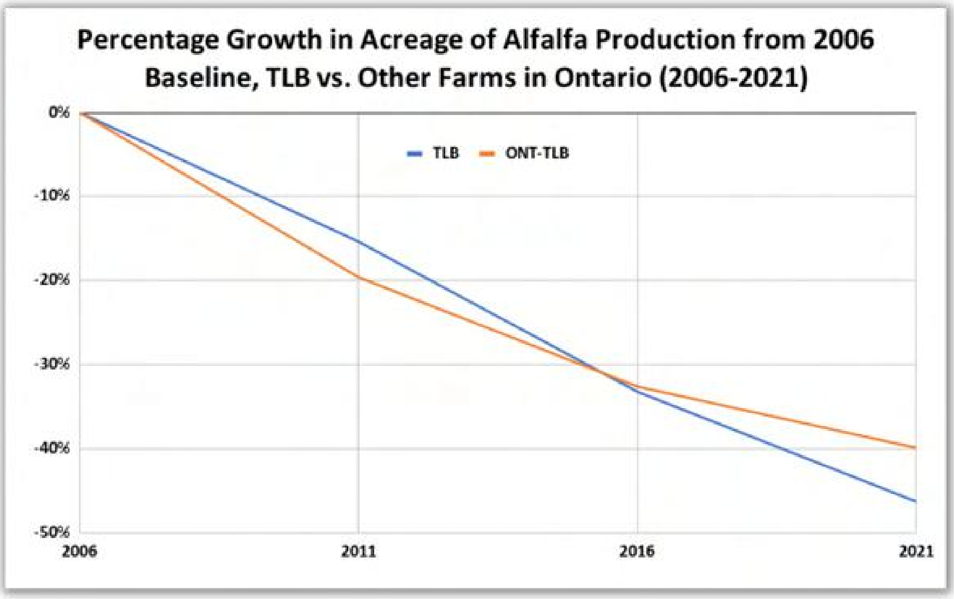
Significant losses

Alfalfa, natural pasture and hay

Decreases in alfalfa production

Alfalfa is a legacy crop of TLB

46% decrease in alfalfa production from 2006-2021



Alfalfa still accounts for 13.28% of all farm area in TLB, or 26% of hay and field crop acreage

Significant losses

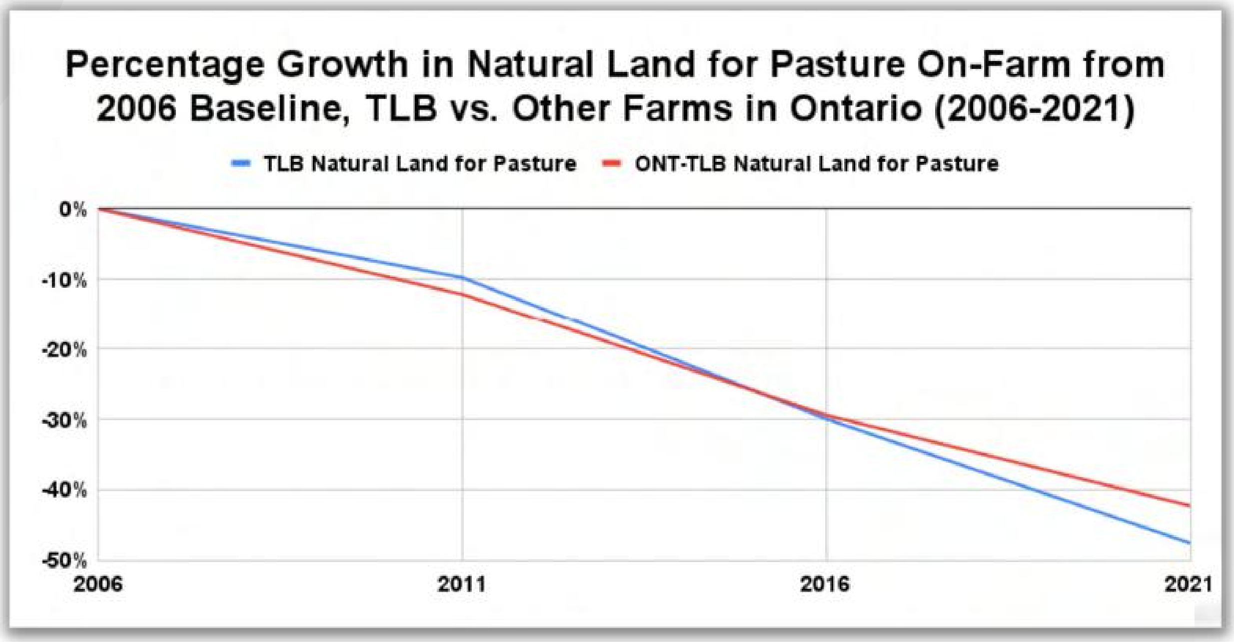
Alfalfa, natural pasture and hay

Decrease in acres of natural pastureland

Legacy farmland use in TLB

43% decrease in natural pastureland

from 2001-2021



Natural pastureland declined from 360,696 acres in 2001, to 157,858 acres in 2021

Significant losses

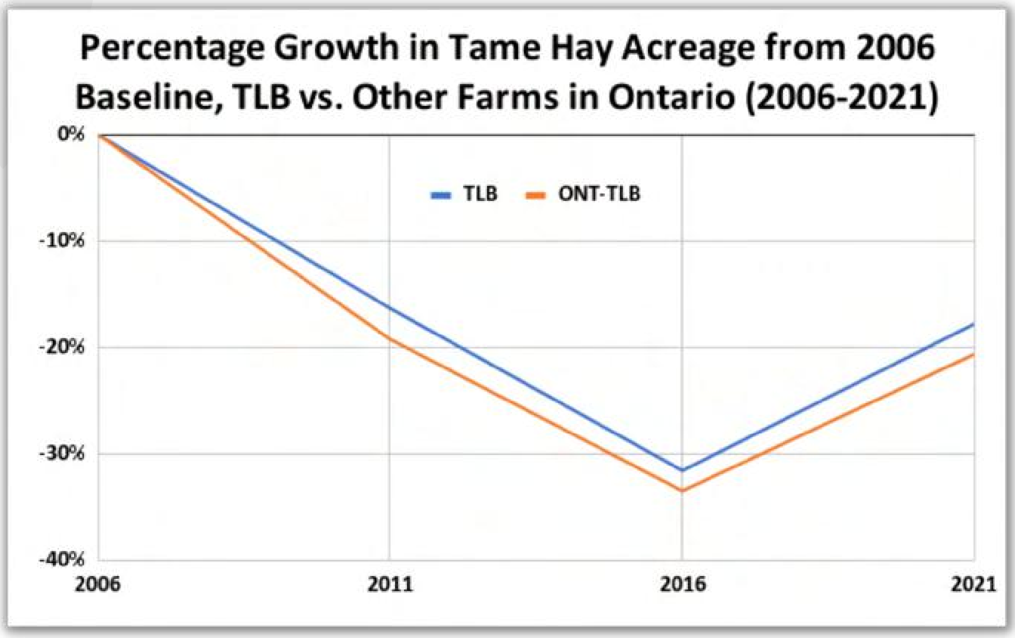
Alfalfa, natural pasture and hay

Decrease in tame hay acreage

Legacy farmland use in TLB

18% <u>decrease</u> in tame hay acreage

from 2006-2021



Tame hay saw the largest proportional decrease between 2006-2016 where the total acreage declined from 148,364 to 101,575. However by 2021, total acreage of tame hay had increased to 122,039 acres, or approximately 20% growth from the 2016 total

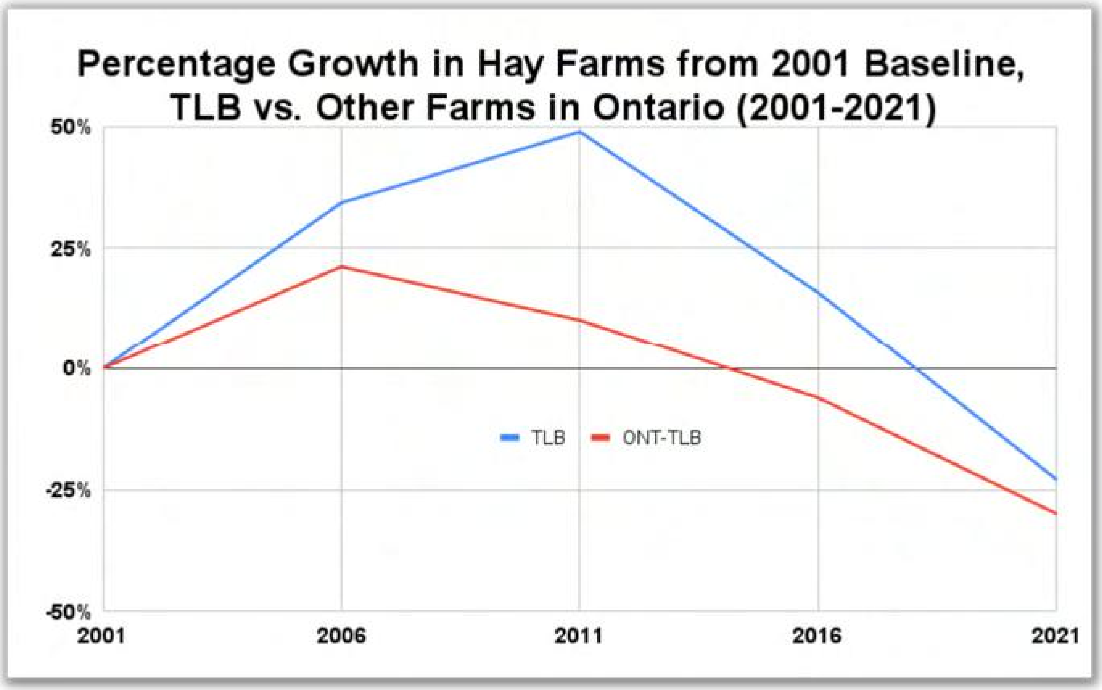
Significant losses

Alfalfa, natural pasture and hay

Decrease in number of hay farms

Legacy farmland use in TLB

52% <u>decrease</u> in the number of hay farms from 2011-2021



Hay farms in TLB have declined from a 2011 high of 1,244 farms, to just 643 in 2021

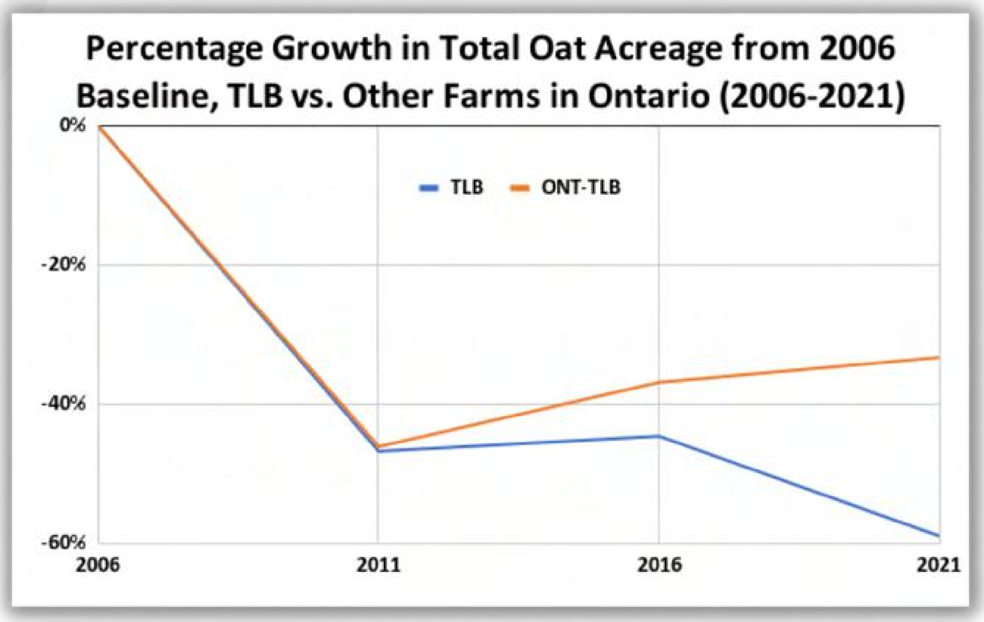
Significant losses

Oats

Decrease in acres of oats

59% decrease in *acres of oats* from 2006-2021

In 2006, 14,515 acres in TLB were planted with oats; however by 2021 this number dropped to 5,956. There appears to be a sentiment amongst farmers that oats are "old school", and will not generate the profits of crops like soy and field corn.



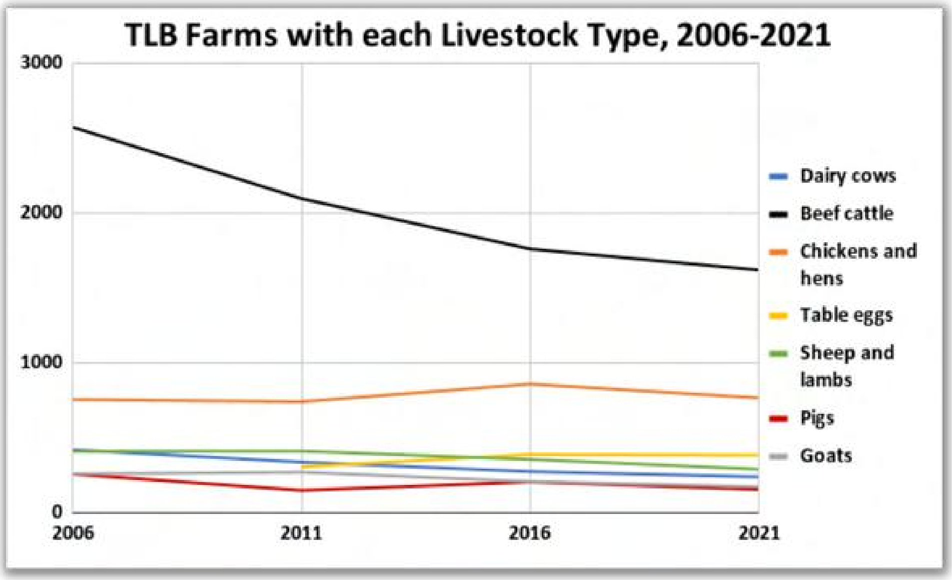
NOTE: 73% of Ontario oats stay in Ontario, and of that, 60% is used for human consumption (1)

(1) 2018 stats. from Grain Farmers of Ontario, Market utilization overview

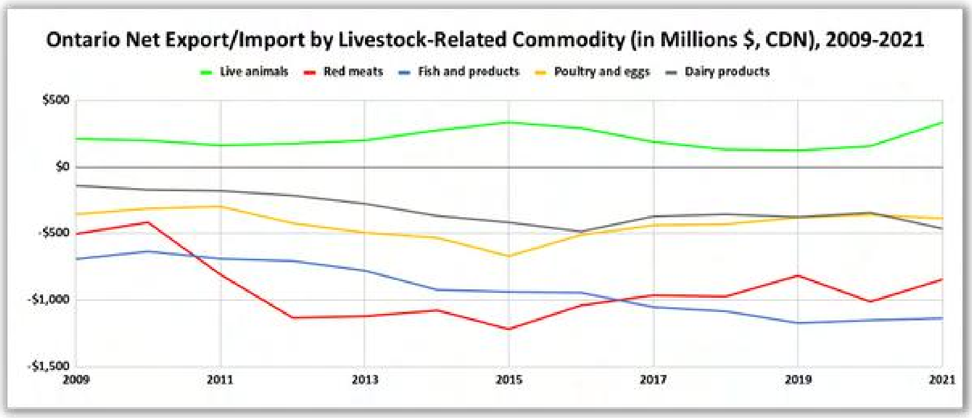
Significant losses

General livestock summary

General decrease in number of livestock farms



Where are our other livestock products coming from?



The Land Between
Cottage Country's Conservation Organization

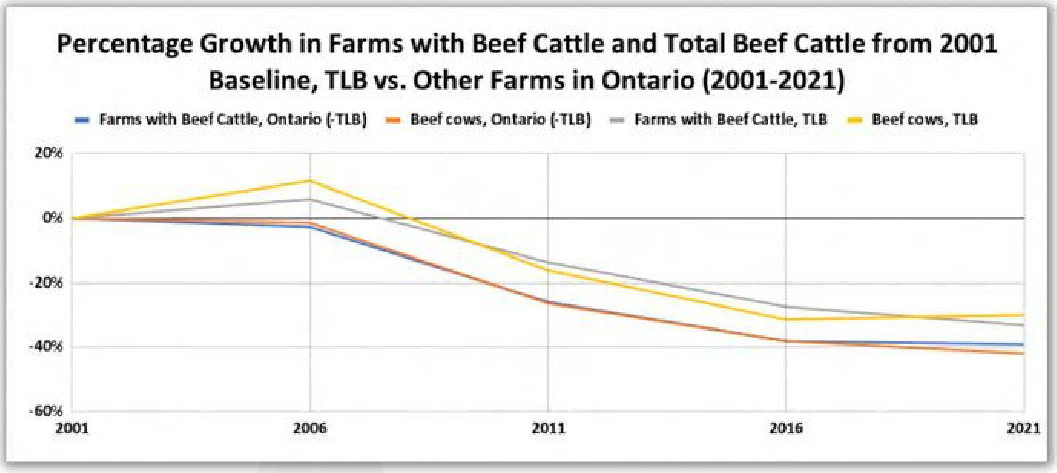
Significant losses

Beef cattle

Loss in beef cattle farms and herd size

TLB has a strong heritage of cattle farming

30%+ decrease in the number of farms with ***beef cattle and total cattle herd size*** from 2001-2021



Large losses in beef (-33% farms, -30% herd) from 2001-2021. Ontario herd sized declined by 40% over the same period.

There was a decrease from 41% to 33% in the portion of ***TLB farms classified as beef cattle farms*** from 2001-2021

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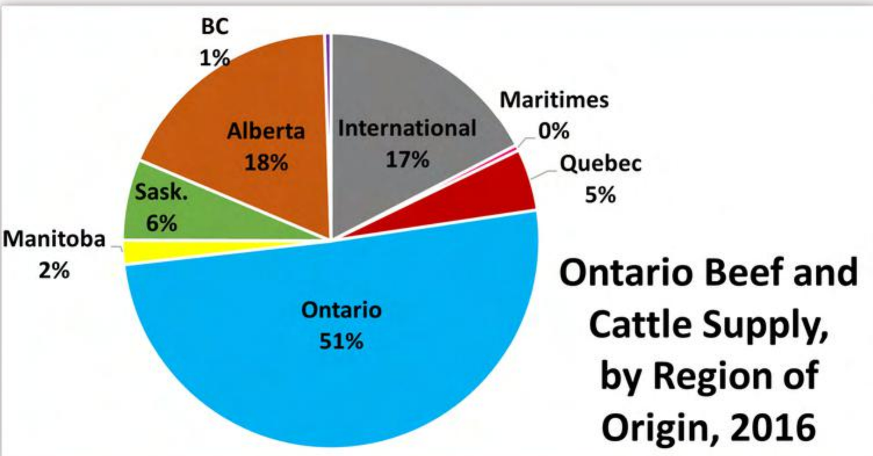
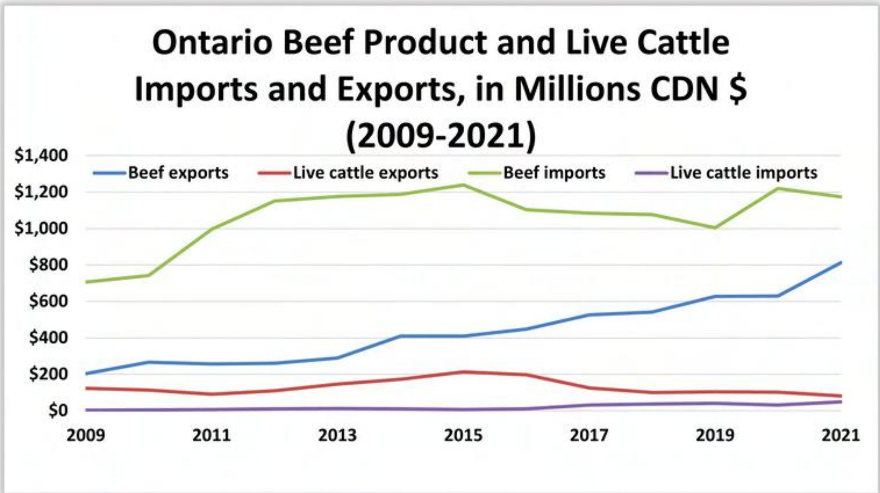
Significant losses

Beef cattle

Where is Ontarians' beef coming from?

An importing-exporting conundrum





Almost half (49%) of Ontario's beef is imported from out of province. This means that Ontario has heavy reliance on beef imports to meet consumer demands. As seen with trade disruptions due to the COVID pandemic, this kind of dependence can lead to rapid and significant price increases, that have the greatest impact on people of lower socioeconomic status. These supply and price concerns are compounded by the fact that Ontario also *exports* large amounts of beef products and live cattle every year. This import-export conundrum is due to many factors including Ontario's lack of processing capacity.

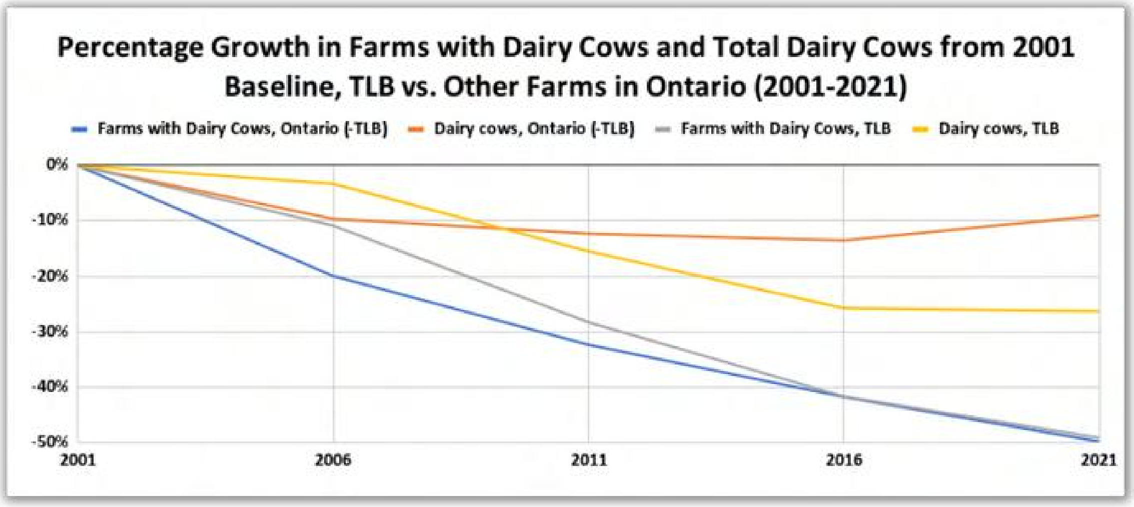
Significant losses

Dairy cattle

Loss in dairy cattle farms and herd size

TLB has a strong heritage of cattle farming

49% decrease in number of ***dairy cattle farms and 26% decrease in herd size*** from 2001-2021



Average number of dairy cattle *per* farm in Ontario grew more than 100% in that time (2001-2021), from 42 to 86 cows.

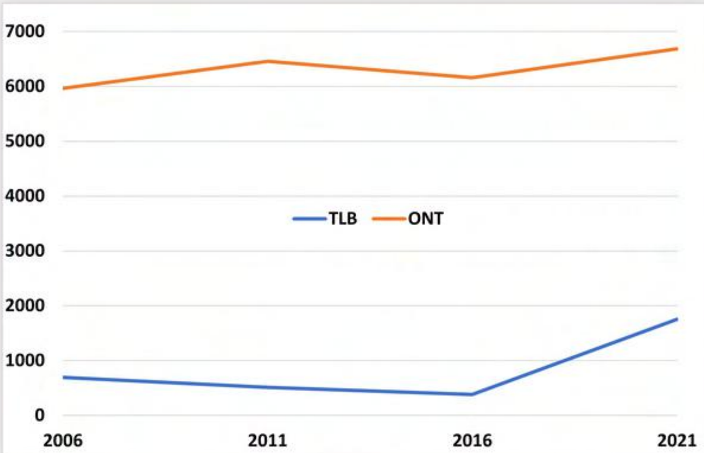
Significant losses

Chicken farms

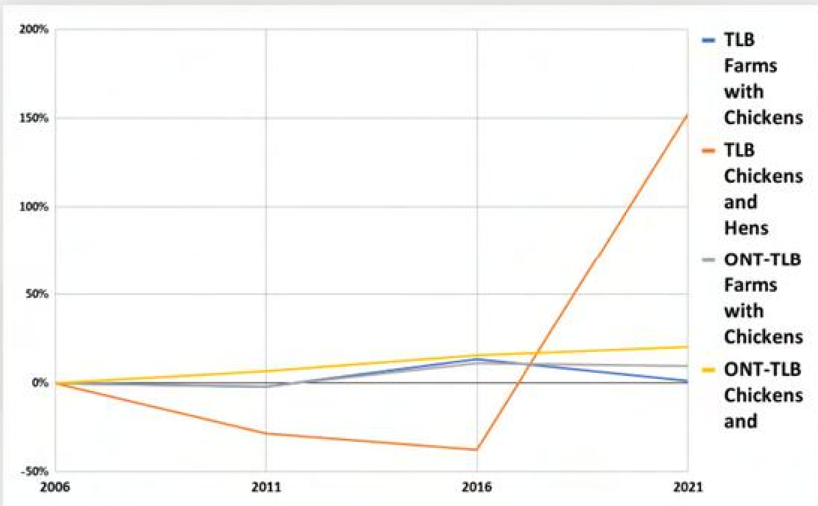
Decrease in amount of chicken farms

Less farms, greater intensification

Over 11% loss in the number of ***chicken farms,*** but an ***increase*** in the number of ***chickens per farm***



Birds Per Farm, TLB vs. Other Farms in Ontario, 2006-2021



Percentage growth in farms with chickens and total chickens from 2001 baseline, TLB vs other farms in Ontario (2001-2021)

11% loss in number of chicken farms from 2016-2021; however since 2006, the number of chickens per farm has greatly increased (692 in 2006 vs 1,752 in 2021).

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Significant losses

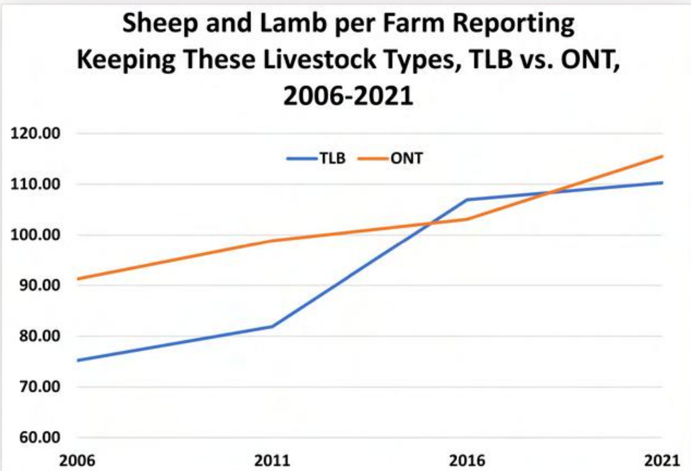
Sheep and lamb farms

Decrease in the number of sheep & lamb farms

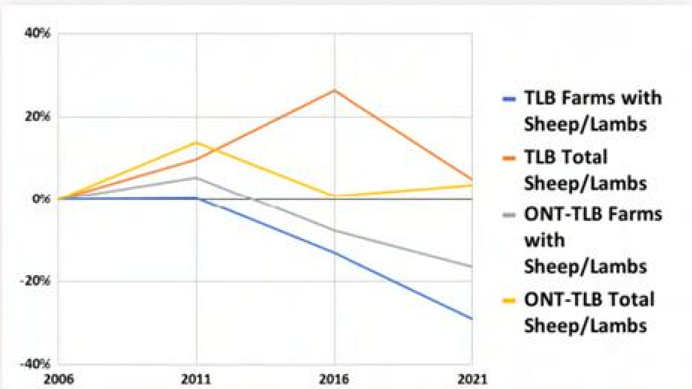
Less farms, greater intensification

71% loss** in the number of **farms with sheep and lamb,** but **5% increase in total number of sheep

In 2006 there were 409 farms reporting sheep and lambs, and by 2021 this decreased to 290 farms. Total herd size was 31,993 in 2006 and 33,478 in 2021.



Here you can see the **percentage change in TLB sheep herd size, and the number of farms with sheep, compared to other farms in Ontario,** from a 2006 baseline.

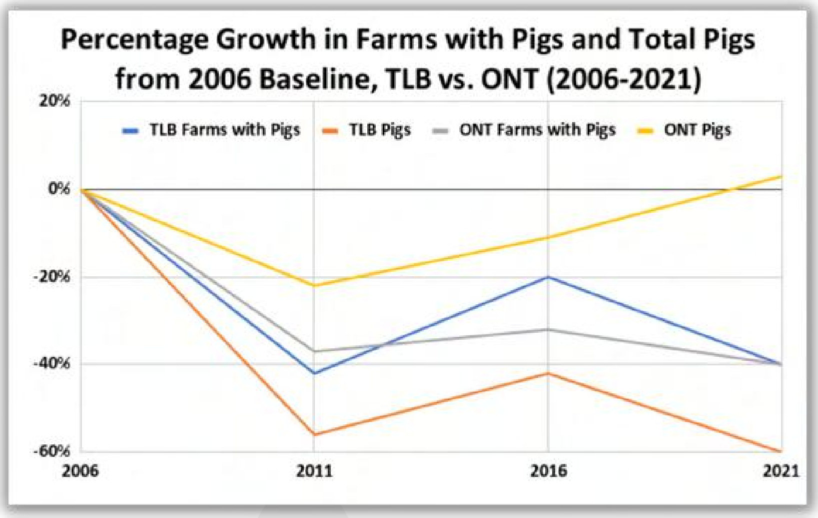


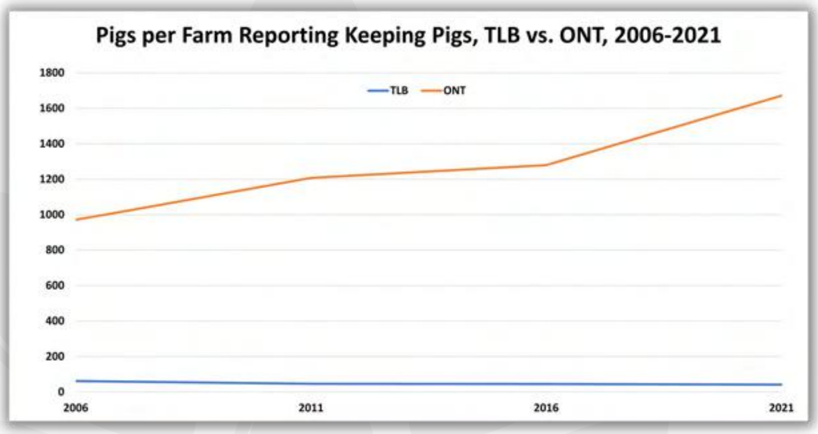
Significant losses

Pigs

Decreased amount of farms with pigs & total drove size

48% loss in the number of *pigs per farm* from 2006-2021 and a *60% decrease* in the *total drove size* from 2016-2021





On average, TLB farms with pigs had 1,629 *less* pigs per farm than Ontario overall in 2021. Total drove size dropped from 9,408 in 2016 to 6,488 pigs in 2021

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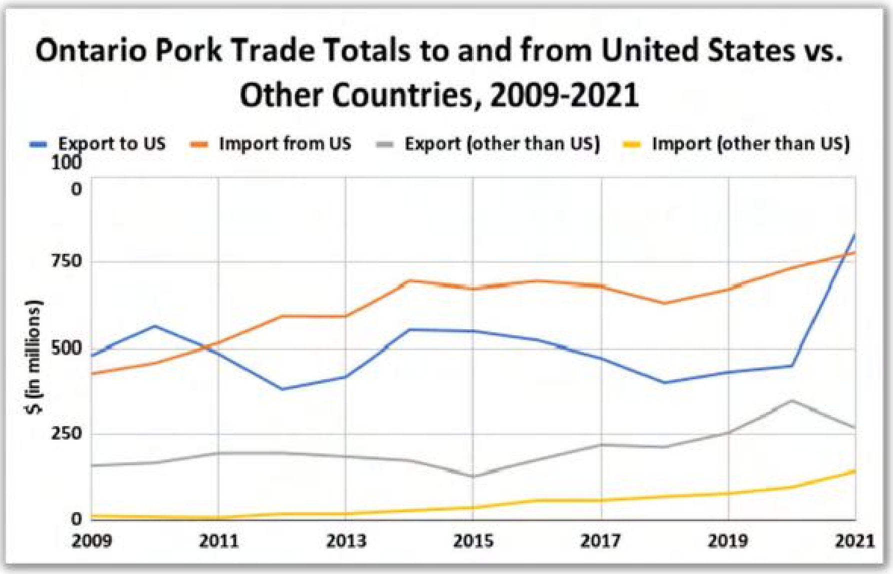
Significant losses

Pigs

Where is Ontarians' pork coming from?

An importing-exporting conundrum



Ontario imports and exports high quantities of pork. In 2021 Ontario exported $503.5 million and imported $778.4 million worth of pork to and from the United States. Within these metrics, Ontario exported $404.9 million in fresh/chilled/frozen pork while importing virtually the same amount, $419.3 million.

In total, Ontario exported $771.8 million and imported $919.3 million worth of pork in 2021, resulting in a -$147.5 million pork trade deficit. In contrast, in 2009, Ontario exported only $548.1 million worth of pork and imported $438.3 million, resulting in a trade surplus of $109.8 million. This means that in 2009 Ontario was producing the majority of pork that Ontarians consumed; however by 2021 Ontario was exporting 141% more pork than 2009 while importing over 200% more. For reference, in 2009, Ontario's population was around 12,697,097, while by 2021 that number had increased by 14% to 14,500,397 — much less than the increase in pork exports (141%) and imports (200%).

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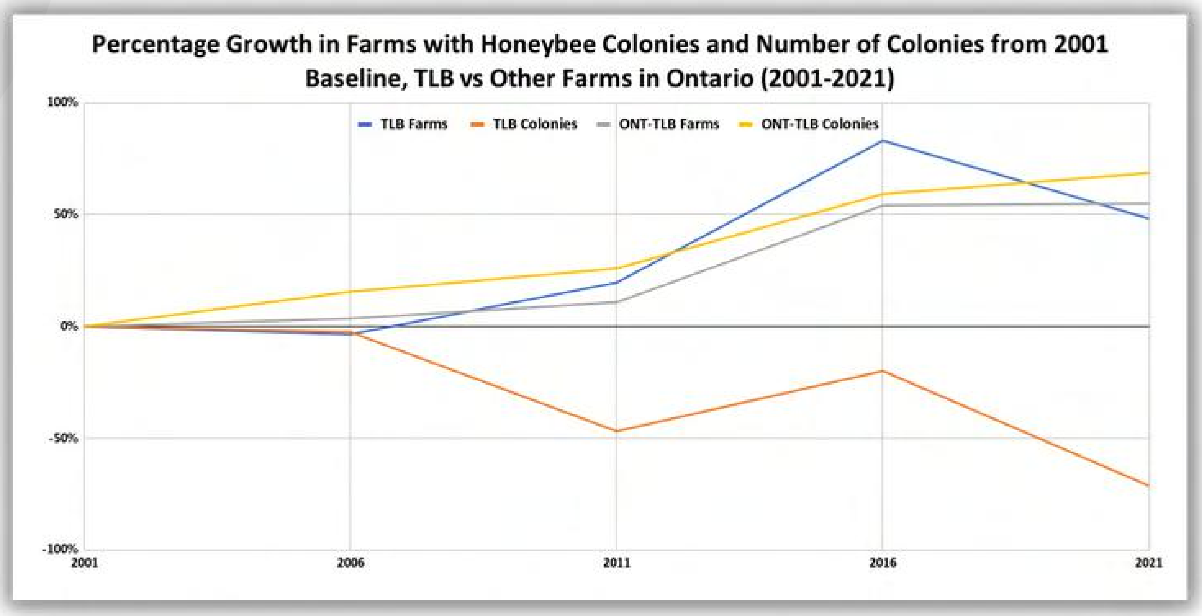
Significant losses

Apiaries

Decrease in total apiaries

Losses in the number of farms with honeybee colonies

21% decrease in ***farms with honeybee colonies*** from 2016-2021



TLB census regions declined from 205 to 166 farms with honeybee colonies from 2016-2021, while Ontario gained 7 farms with colonies in total over that same period.

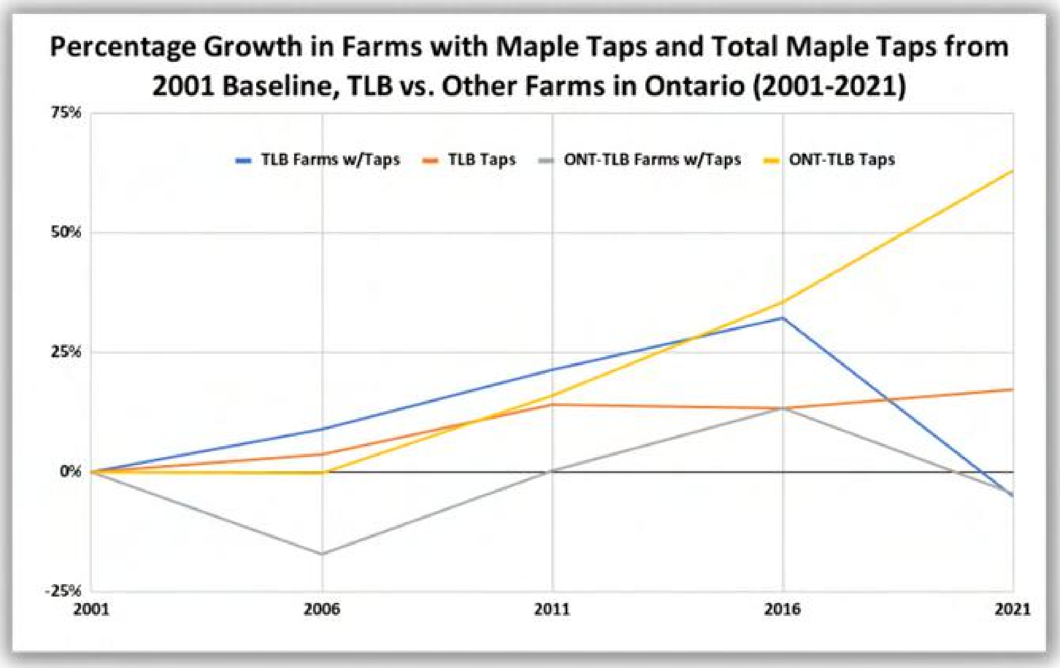
Significant losses

Maple syrup farms

Decrease in the number of farms with maple taps

Less farms, greater intensification

13% decrease in ***farms with maple taps,*** but a ***13% increase*** in the ***number of maple taps*** (2006-2021)



There were 403 farms with 257,310 taps reported in 2006, vs. 351 farms with 290,992 taps in 2021. 2021's farm total is lower than the 2016 high of 489 farms with maple taps, but the number of total taps is now greater.

04

Significant growth

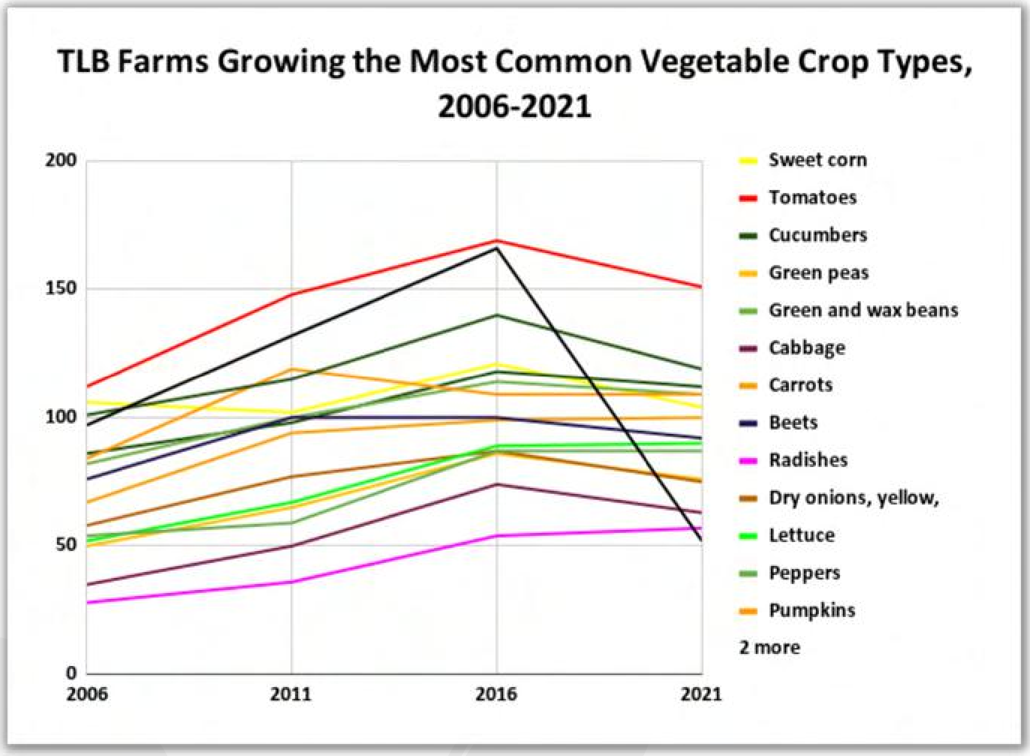
- Vegetables
- Greenhouse vegetables
- Mushrooms
- Fruits
- Organic products
- Soybean, corn, rye and wheat
- Egg production
- Renewable energy
- Direct sales

Significant growth

Vegetables

Increase in farms reporting vegetables

Approximately 6% increase in the number of ***farms growing vegetables*** from 2006 to 2021; however that percentage is down from 2016 highs

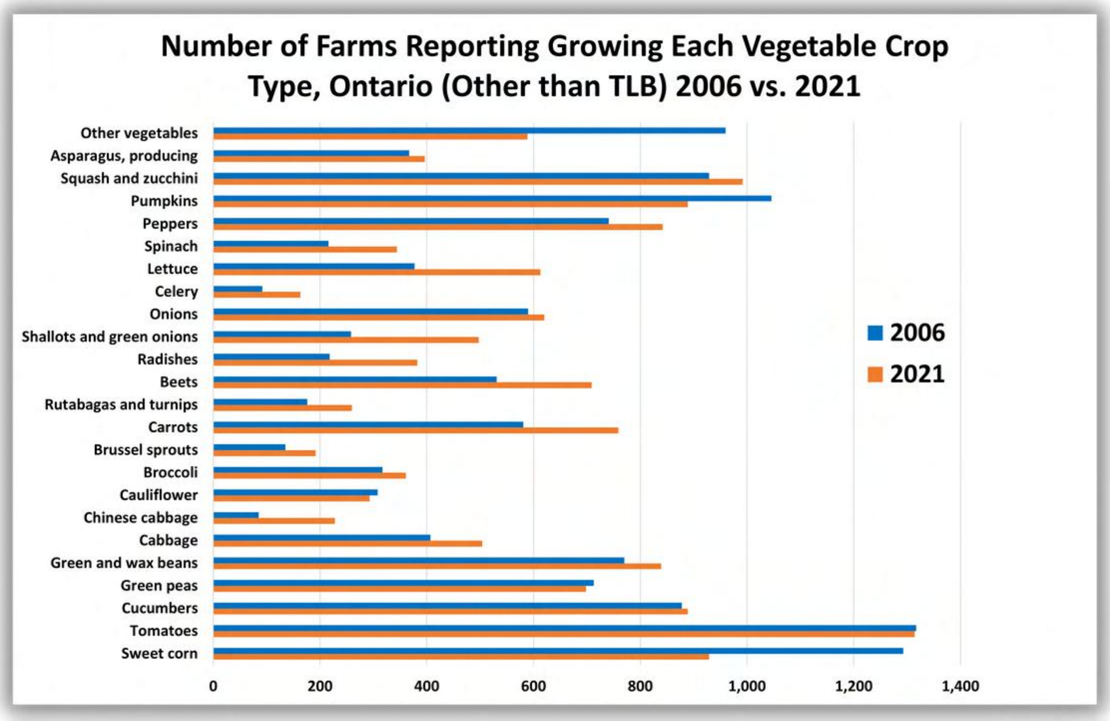


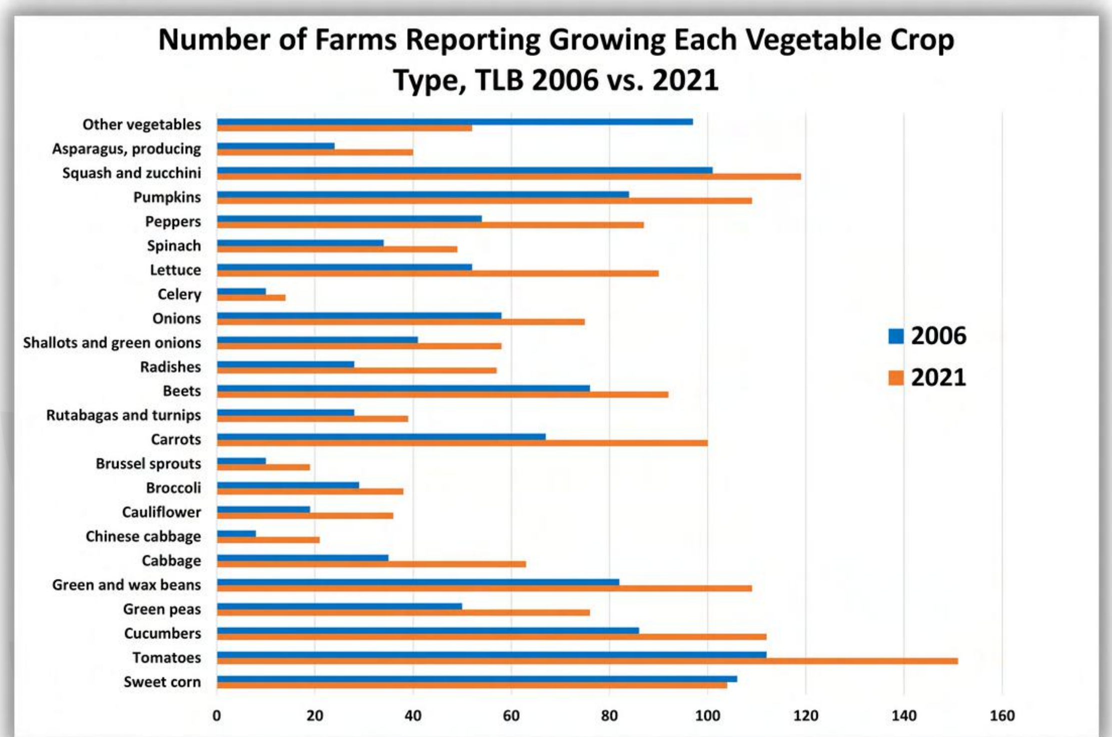
From 2006-2021 the amount of farms growing vegetables in TLB grew from 245 to 259 farms; however this is down 61 farms from the 2016 high of 320.

Significant growth

Vegetables

Increase in farms reporting vegetables





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Significant growth

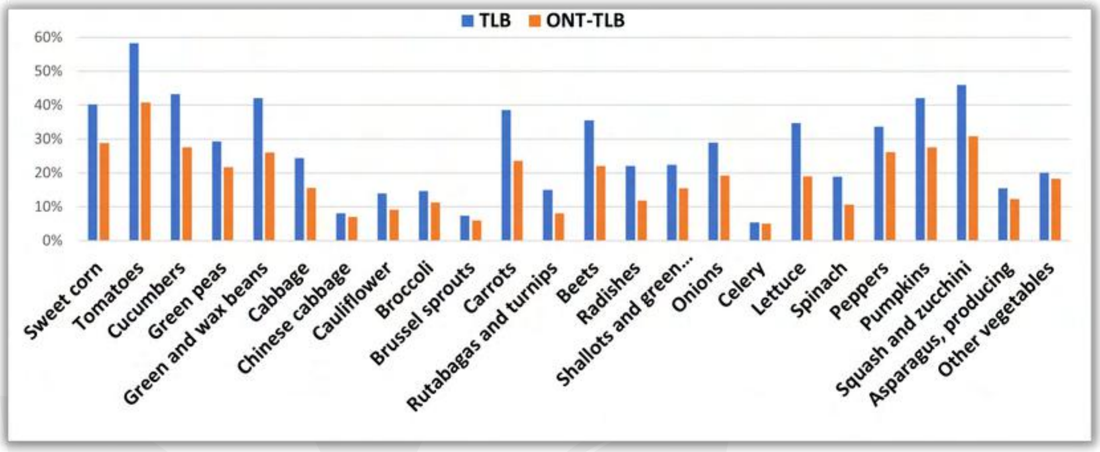
Vegetables

Increased vegetable diversity

Farms with vegetables in TLB tend to grow multiple types of vegetable crops

TLB farms with vegetables have a ***greater variety of vegetable crops per farm*** than other farms in Ontario

Percentage of Farms with Vegetables Growing of Each Crop Type, TLB vs. Other Farms in Ontario, 2021



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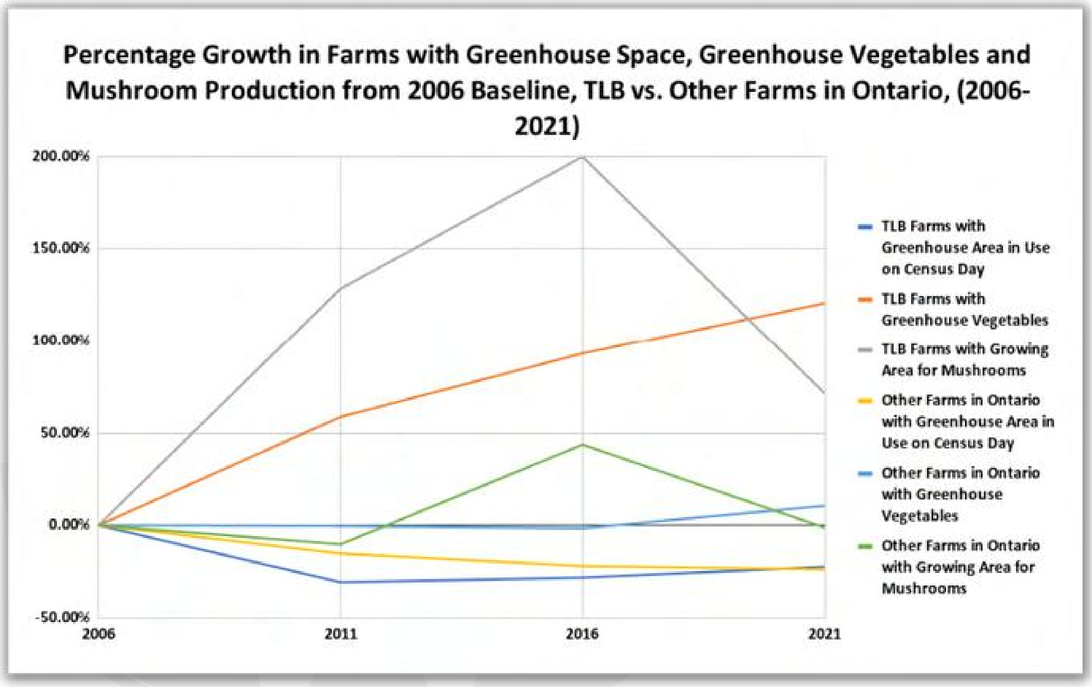
Significant growth

Greenhouse vegetables

Increase in farms with greenhouse vegetables

The amount of greenhouses growing vegetables in TLB has increased

The number of greenhouses growing vegetables has ***increased by 137%*** from 2006 to 2021



The number of greenhouses growing vegetables in TLB increased from 27 to 64, between 2006 and 2021.

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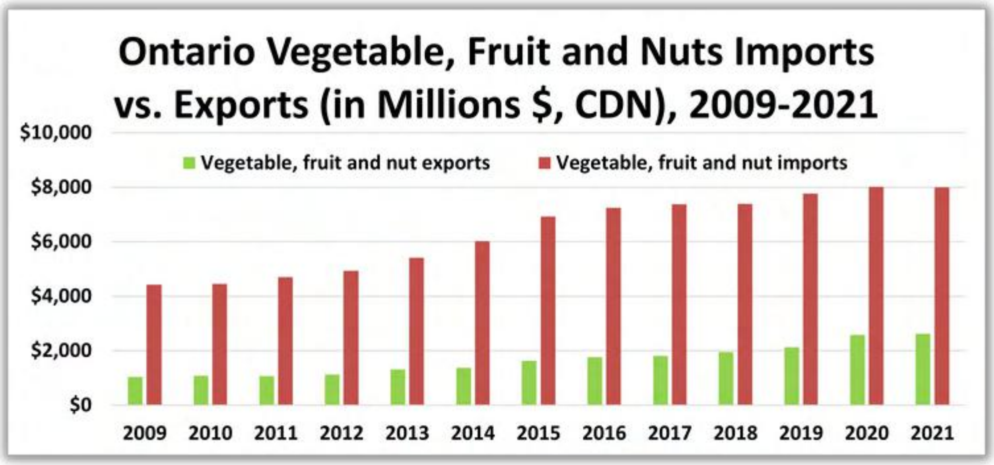
Significant growth

Vegetables

Increase in vegetable imports *and* exports in Ontario



According to the Ontario Produce Marketing Association, fruit and vegetable production contributes $4.2 billion and over 66,000 jobs to the economy, with 57% of that value coming from greenhouse crops, and $2 billion in total crops exported annually.

The Ontario Fruit & Vegetable Growers' Association stated that greenhouse production accounted for more than half of Ontario's produce exports in 2019.

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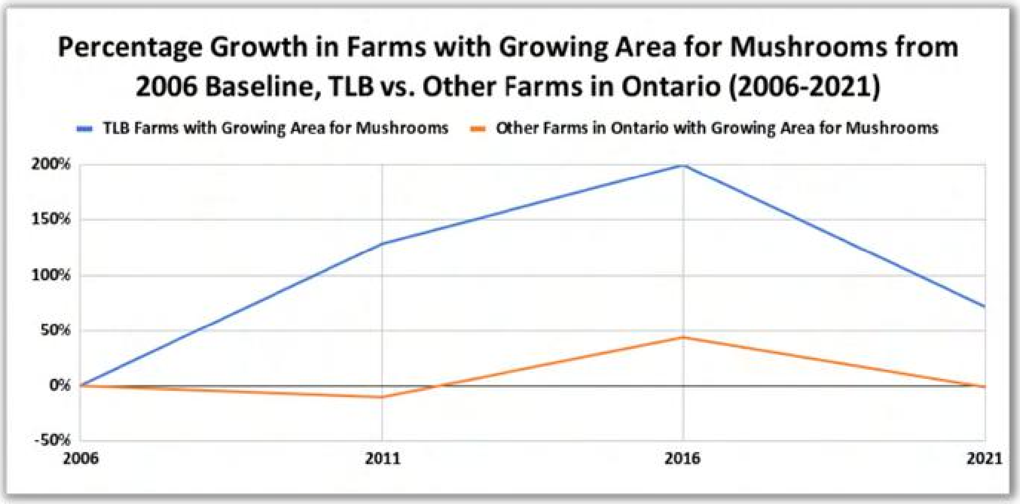
Significant growth

Mushrooms

Increase in farms growing mushrooms

140% increase in farms growing mushrooms



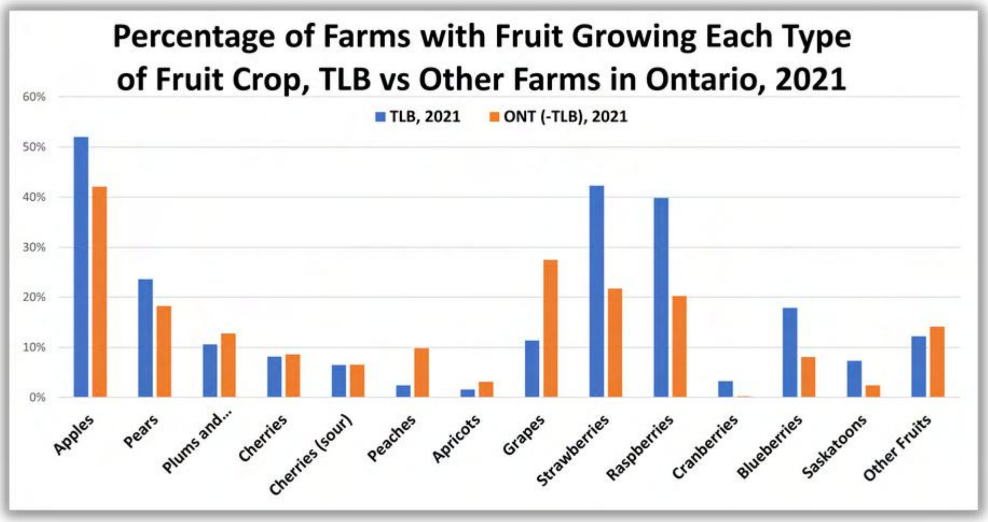
Increase in farms with mushroom production from 5 in 2006 to 12 in 2021, however this is down from a 2016 high of 18 farms.

Significant growth

Fruits

Increase in farms with fruits

23% increase in the number of farms growing fruits



TLB has increased in the number of farms growing fruit from 110 in 2006 to 123 in 2021

83% increase in farms growing apples and ***20% increase*** in the percentage of TLB farms with fruit growing apples (2006-2021)

Apples are the most commonly reported fruit crop in TLB, with an increase in the number of farms reporting growing apples, from 35 in 2006 to 64 in 2021.

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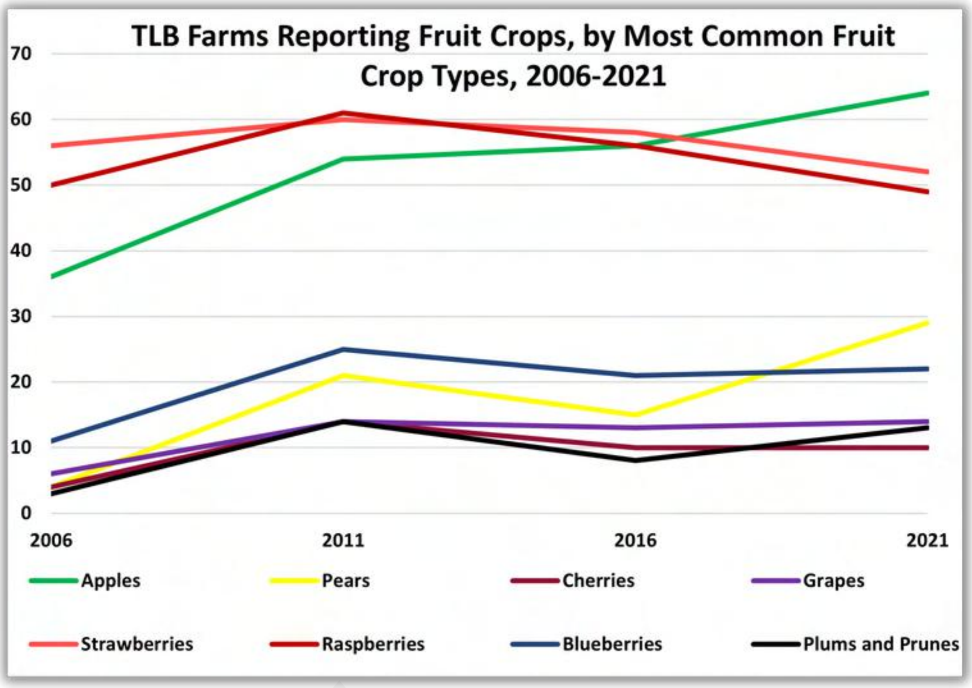
Significant growth

Fruits

Many types of fruit are seeing increased growth on TLB farms



Apples, strawberries and raspberries are, by far, the most popular fruit crops grown on TLB farms. However, other fruit types, such as pears and plums/prunes are experiencing increased growth in the region. Additionally, as of 2021, TLB was home to 4 of the 9 farms with cranberries in Ontario

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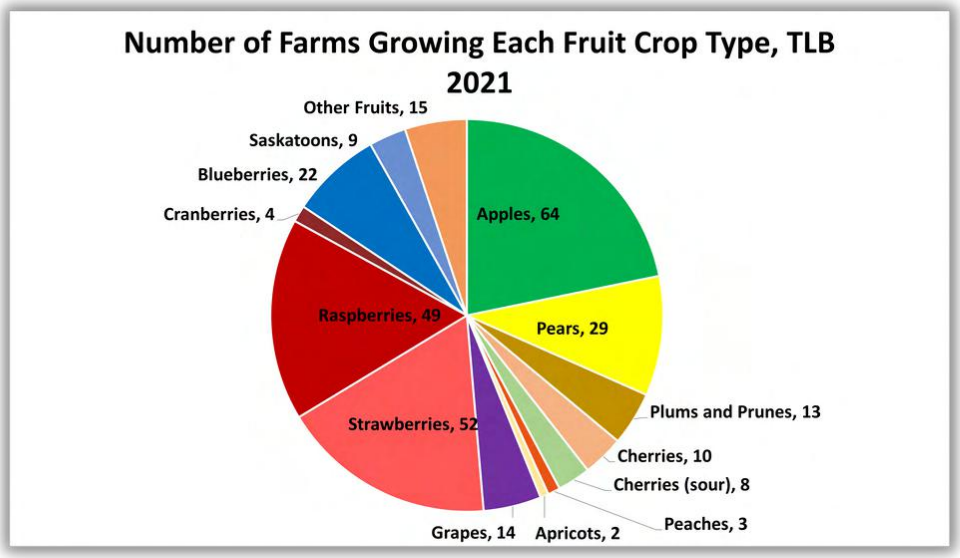
Significant growth

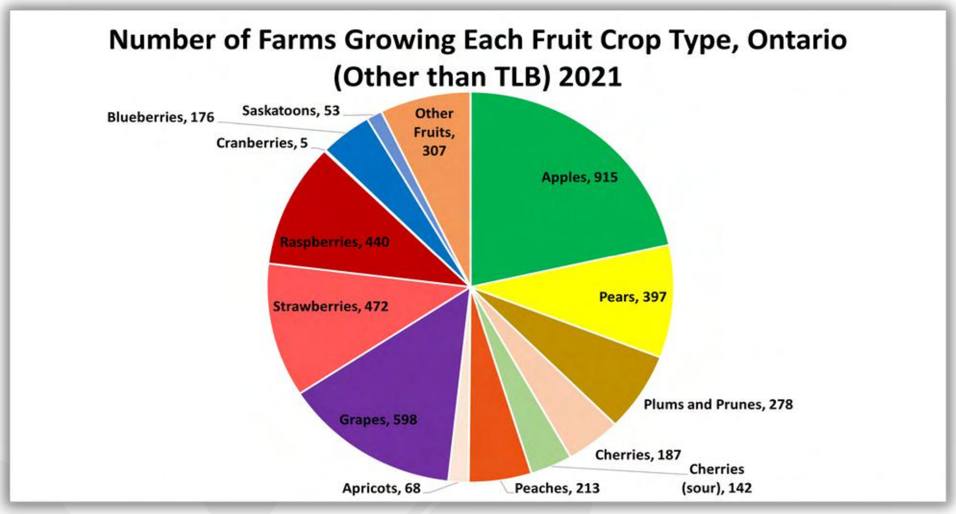
Fruits

Many types of fruit are seeing increased growth on TLB farms

Ontario vs. TLB



Number of Farms Growing Each Fruit Crop Type, TLB 2021



Number of Farms Growing Each Fruit Crop Type, Ontario (Other than TLB) 2021

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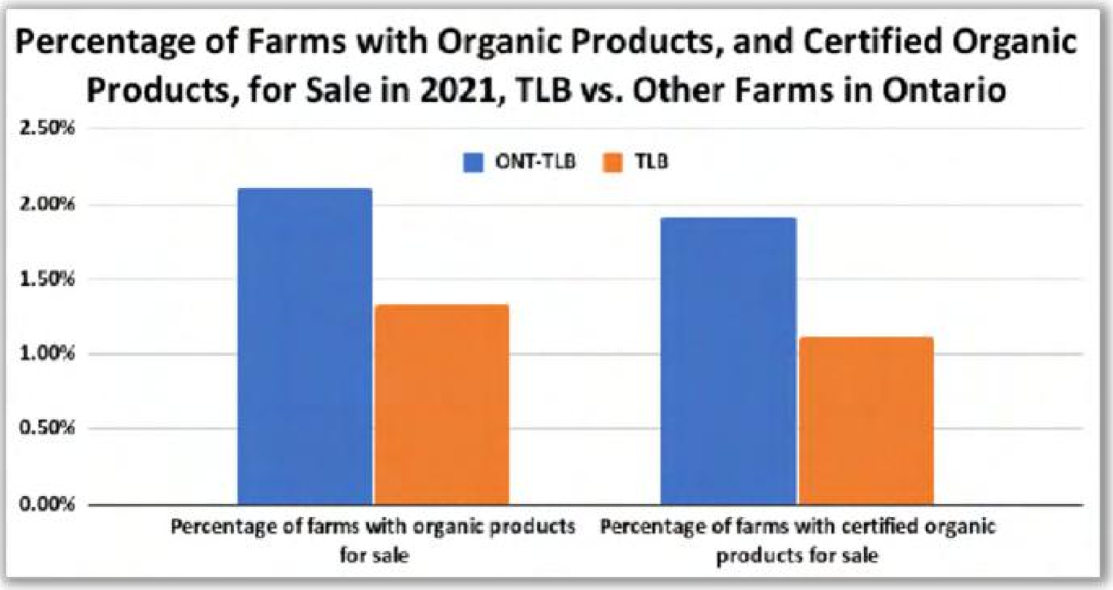
Significant growth

Organic agriculture

Increase in certified organics production

4% increase in farms with *organics production* from 2011-2021

In 2011 there were 49 farms reporting organics production, and by 2021 that grew to 51 farms.



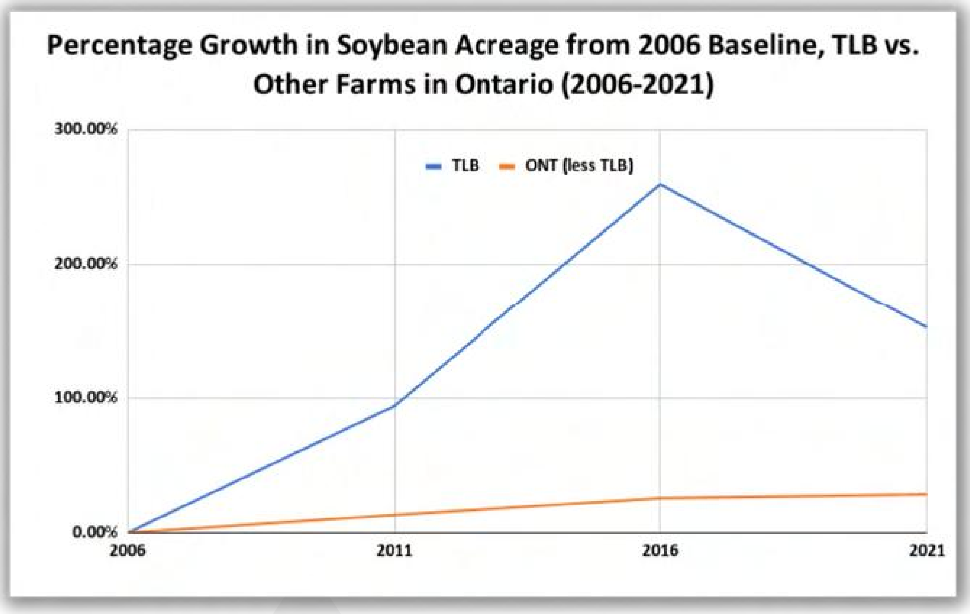
Despite increases, the percentage of farms declaring organic products is still lower than Ontario average

Significant growth

Soybeans

Increase in soybean acreage

152% increase** in **soybean acreage
from 2006-2021



Soybean acreage increased from 33,599 in 2006 to 84,798 in 2021. This total is down from the 2016 high of 120,720 acres in soybean.

59% of Ontario soybeans are exported and of the remaining 41%, 77% is used for animal feed (1)

(1) 2018 stats. from Grain Farmers of Ontario, Market utilization overview

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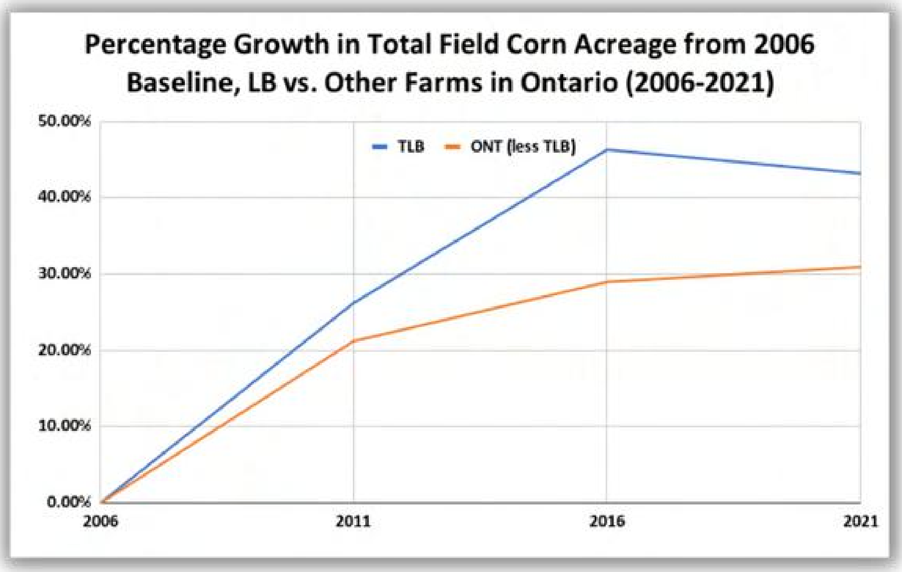
Cottage Country's Conservation Organization

Significant growth

Field Corn

Increase in field corn acreage

43% increase in field corn acreage,
13.4% decrease in number of field corn farms, from 2006-2021



In 2006, total acreage in field corn was 52,773, in 2021 it was 75,552; however this is down from the 2016 high of 77,191 acres. In 2006 , there were 859 field corn farms, and by 2021 this number had decreased to 744.

93% of Ontario field corn stays in Ontario, and of that, 37% goes to ethanol production and industrial uses (1)

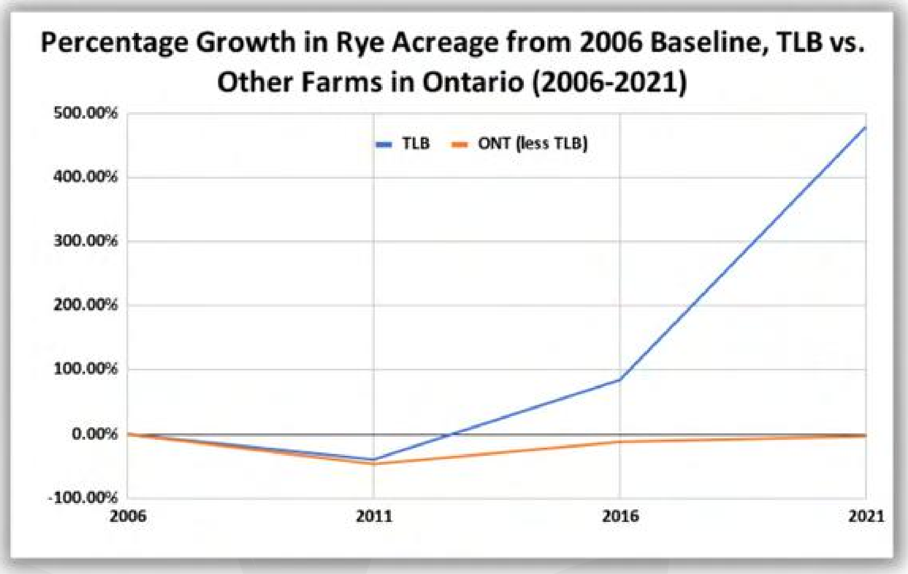
(1) 2018 stats. from Grain Farmers of Ontario, Market utilization overview

Significant growth

Rye

Increase in number of farms with rye and rye acreage

134% increase in *farms growing rye* (2016-2021), *479% increase* in total rye *acreage* (2006-2021)



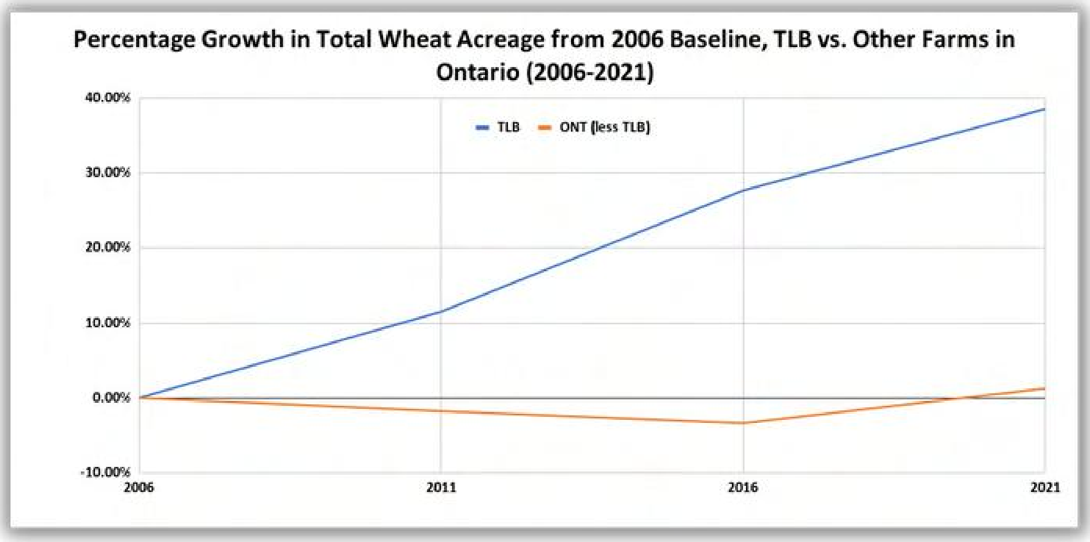
Farms reporting rye in TLB grew from 50 to 117 farms, between 2016-2021. In 2006, total rye acreage was 410, while in 2021 it was 2,373 acres.

Significant growth

Wheat

Increase in wheat acreage

39% increase in ***wheat acreage*** from 2006-2021 and a ***nearly 11% decrease*** in number of **farms growing wheat** from 2011-2021



Wheat acreage has increased every year from 2006 when there were 28,037 acres planted, to 38,846 in 2021. In 2011, there were 833 farms growing wheat, and by 2021, this number dropped to 744 farms.

57% of Ontario wheat stays in Ontario, and of that, 46% is used for human consumption.

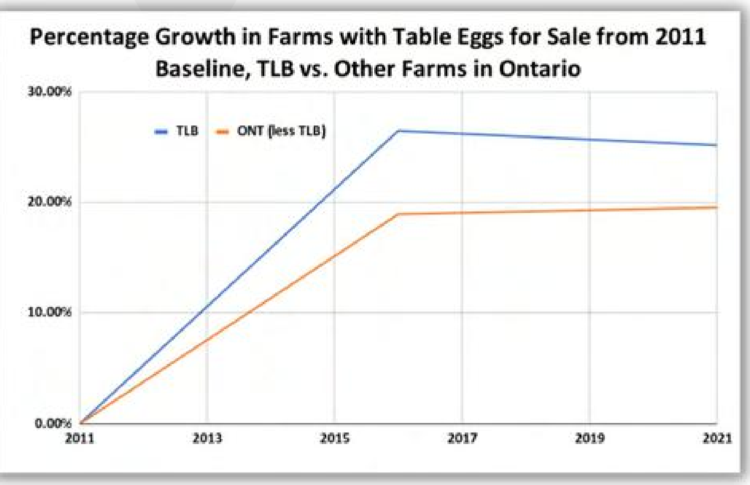
(1) 2018 stats. from Grain Farmers of Ontario, Market utilization overview

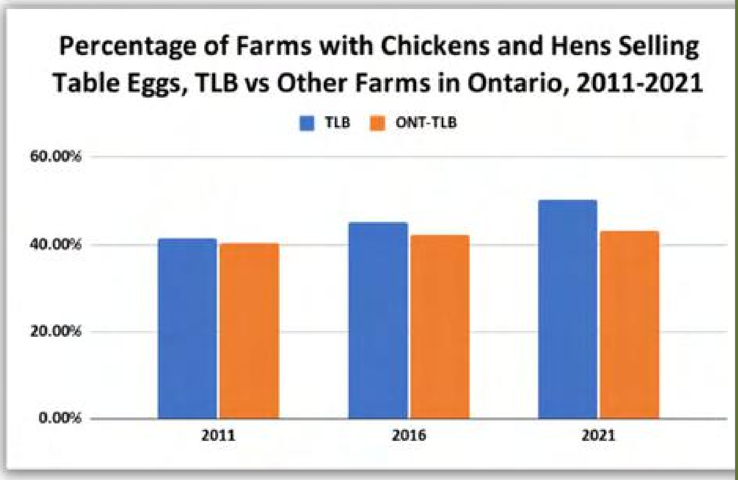
Significant growth

Farms reporting eggs

Increase in farms with eggs

20% increase in farms reporting table eggs, and a ***9% increase*** in the proportion of farms with chickens or hens reporting table eggs for sale, from 2011-2021





Farms reporting table eggs increased from a 2011 total of 306, to 383 by 2021; however this is down from a 2016 high of 387. Only 41% of farms with chickens or hens in 2011 reported selling table eggs, but by 2021 this had increased to 50%

Significant growth

Farms reporting eggs

Increase in eggs reported

4775% increase in the dozens of table eggs
reported for sale from 2016-2021.
SPECIAL NOTE BELOW.

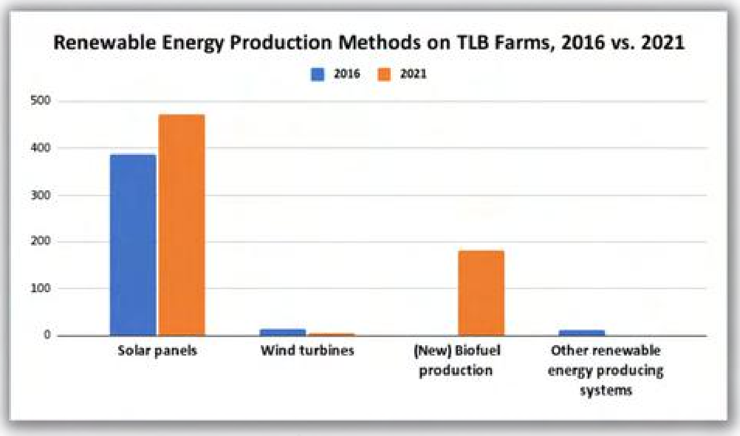
Nearly all of this growth came from Tweed and Stone Mills areas; however neither disclosed their egg totals in 2016 or 2011. Thus, it is difficult to determine when the real increase occurred and if these are from previously established or new farms.

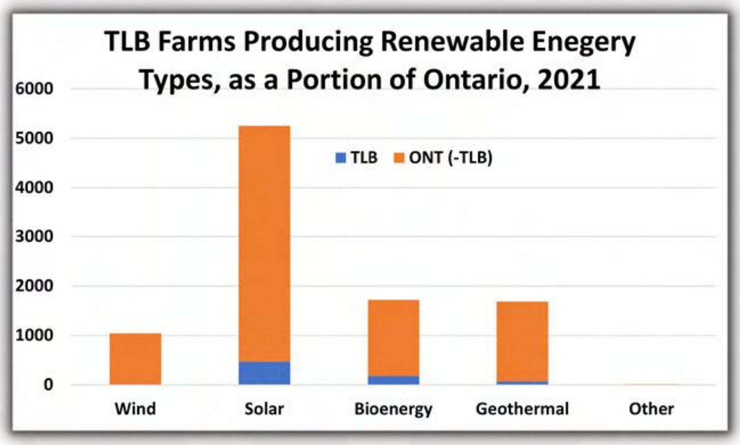
Significant growth

Renewable energy

Increase in farms reporting renewable energy production

17% of farms in TLB produce renewable energy (approximately the same rate as farms elsewhere in Ontario), with the most common form being solar in 2021





TLB farms are slightly more likely to have solar or bio-energy production on-farm than elsewhere in Ontario, but slightly less likely to have wind or geothermal.

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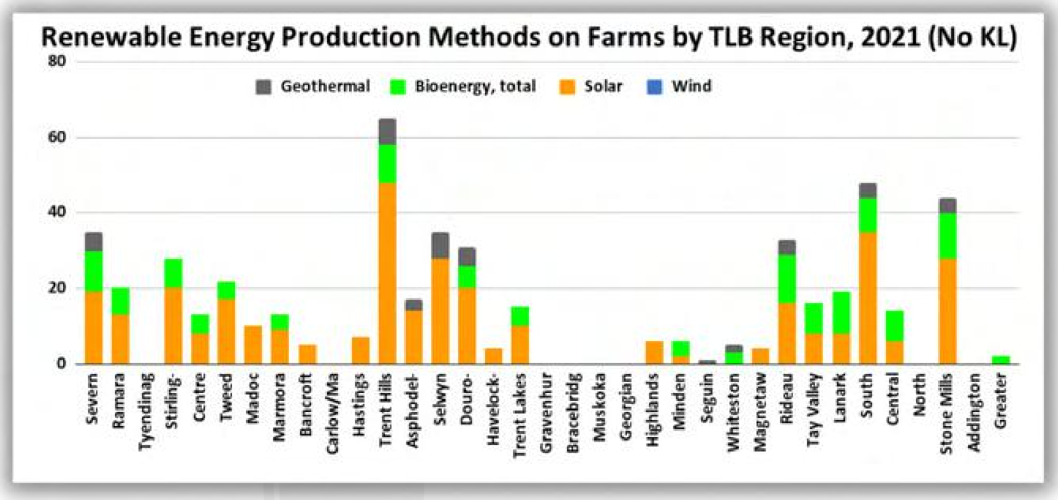
Significant growth

Renewable energy

Increase in farms reporting renewable energy production

Trent Hills , South Frontenac and Stone Mills had the largest number of farms reporting renewable energy production on-farm in 2021



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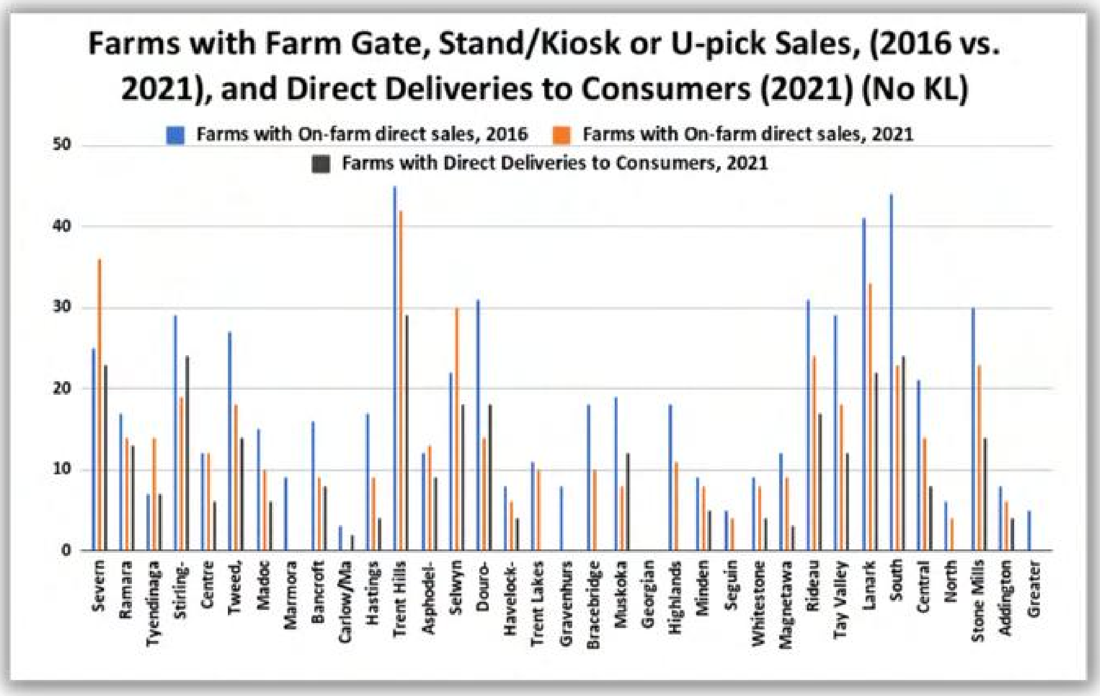
Significant growth

Direct sales

Increase in farms directly selling to consumers

23% of farms reported direct sales in 2021 compared to only 21% in 2016

On-site sales and direct deliveries to consumers were the most common direct sales methods in TLB for 2021.

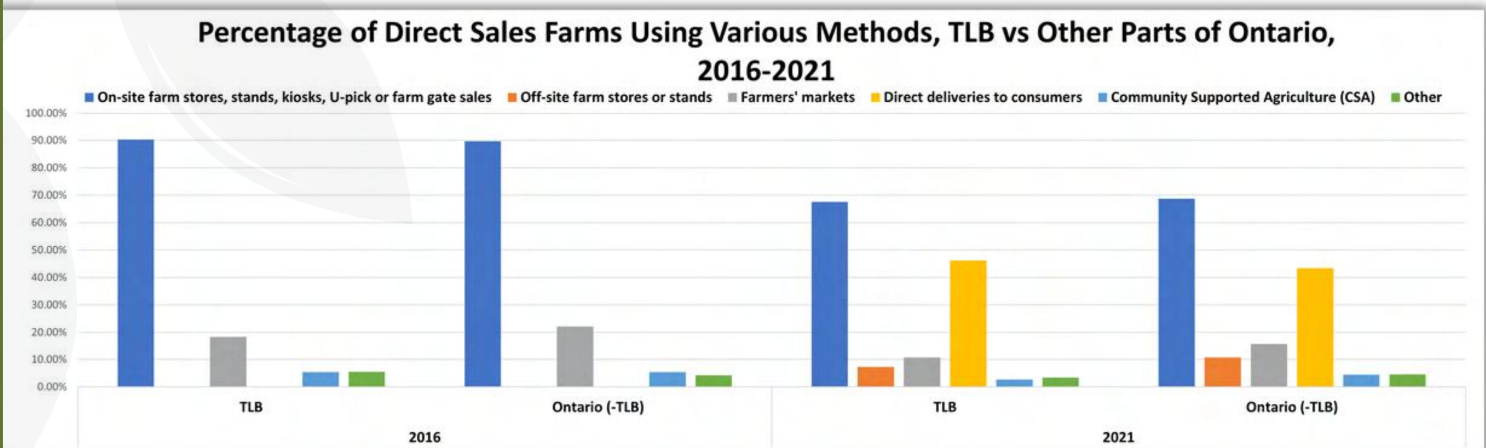


The COVID pandemic had an impact on on-farm direct sales when comparing 2016 and 2021, but farms in many TLB regions were able to diversify their distribution mix by offering direct deliveries to consumers, at a slightly greater rate than farms elsewhere in Ontario.

Significant growth

Direct sales

Increase in farms directly selling to consumers



*Off-site farm stores or stands, and direct deliveries to consumers added as new census categories for 2021

Only 4 TLB regions with a disclosed total for on-farm direct sales in 2021 had less than 8 farms reporting on-site sales of this nature: Havelock-Belmont-Methuen, Seguin, North Frontenac and Addington Highlands. Therefore, there is at least a small foundation of farms with direct sale methods in place throughout many different areas of TLB.

Community supported agriculture (CSA)

South Frontenac was home to the most CSA farms in TLB in 2021, with 6. All other TLB regions had at least one CSA farm, however only Trent Hills (with 4) and Selwyn (with 3) had more than 2. All three of the CSA farms in Selwyn are newly reported in 2021, as were 2 of the 4 CSA farms in Trent Hills. This indicates that there may be opportunity/unmet demand and capacity for CSA agriculture in TLB.

05

Farm Finance

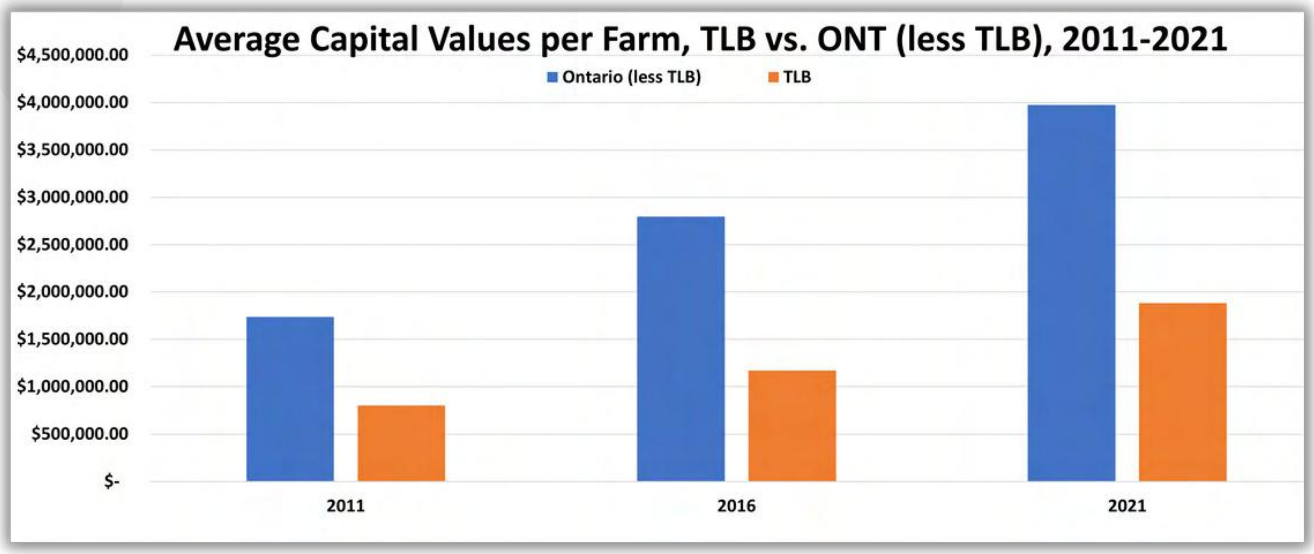
- Farm's market value
- Cost of operation
- Employees
- Farm revenue
- Farm operating arrangements
- Farmer surveys

Farm Finance

Farm's market value

Farmland is cheaper to *own* in TLB

The average capital value of farms in TLB is significantly lower than farms in the rest of Ontario



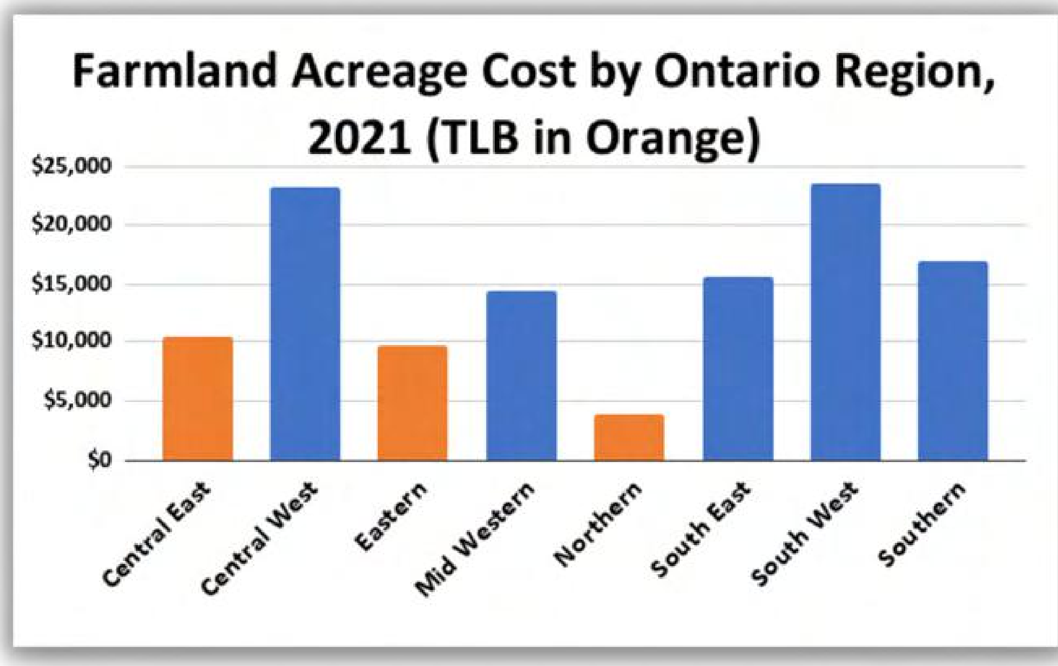
Total farm capital market value has grown by >100% in most TLB regions from 2011-2021.

Farm Finance

Farm's market value

Farmland is cheaper to *own* in TLB

Farms in TLB ***cost less per acre to purchase*** than the cost per acre of other farmland in Ontario

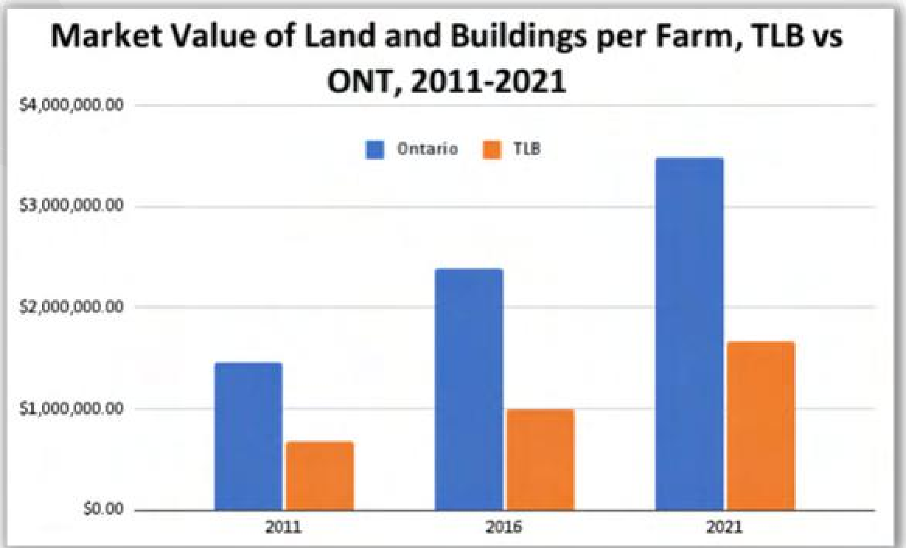


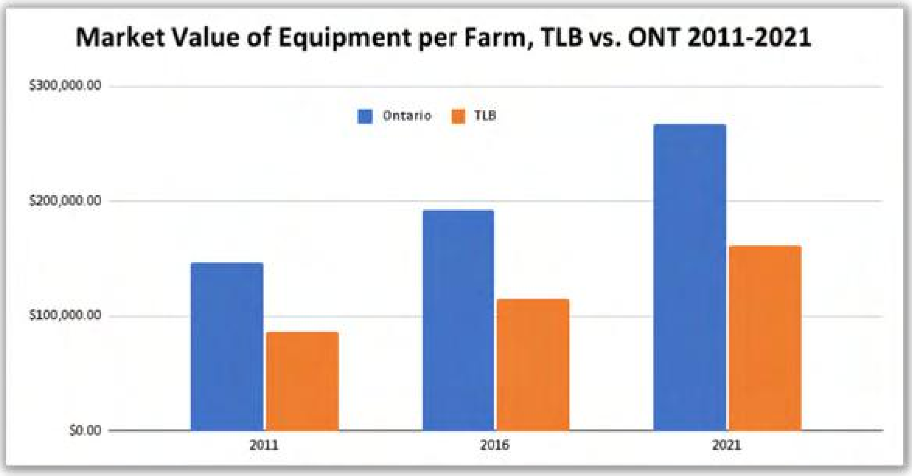
TLB farm property, buildings and equipment cost less in the market than farm property, buildings and equipment in other parts of Ontario. Approximately 90% of capital value for TLB farms is land and buildings.

Farm Finance

Farm's market value

Farmland is cheaper to *own* in TLB





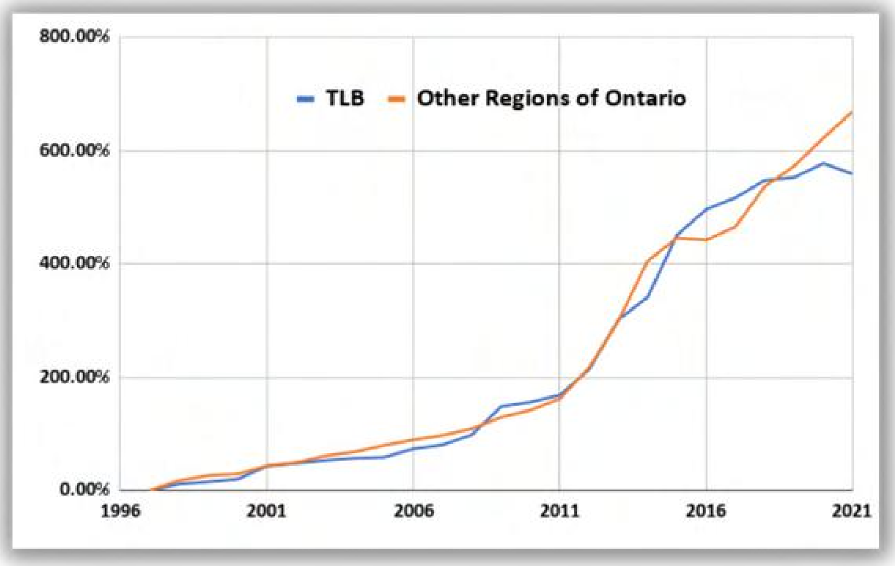
Farm Finance

Farm's market value

Farmland is cheaper to *own* in TLB

The value of TLB farmland is rising at a ***slower rate*** than the average market value of other farmland in Ontario

Farmland Values per Acre Percentage Change from 1996 Baseline, TLB Regions vs. Other Parts of Ontario (1996-2021)



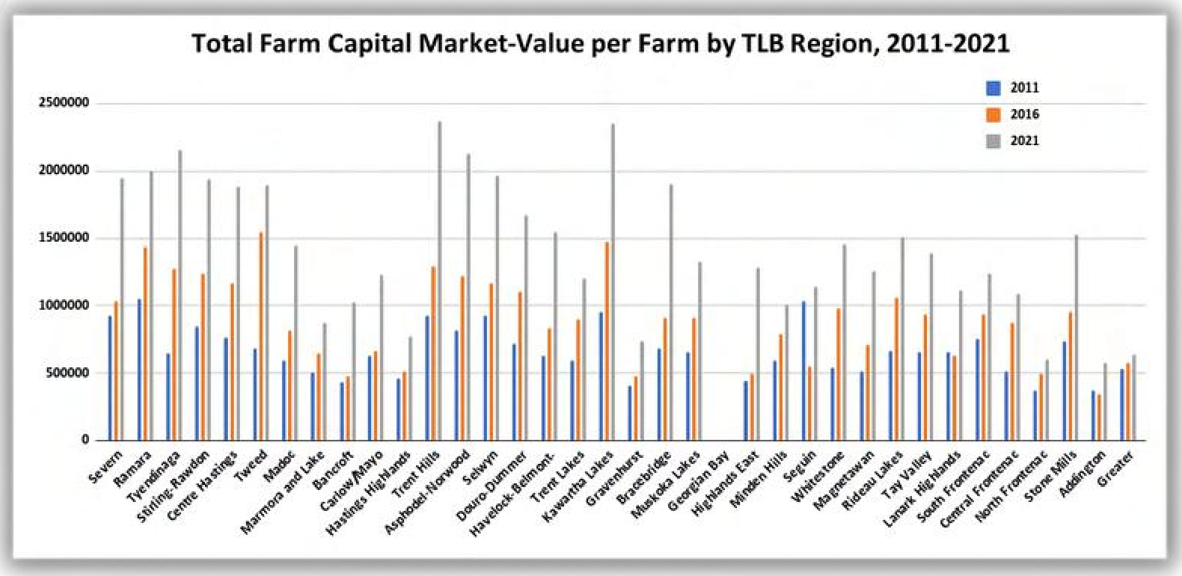
The rate of TLB farms' average market value increased faster than other farms in Ontario from 2014 to 2016. However, from 2016 to 2021, the value of farmland in non-TLB regions of Ontario grew much faster.

Farm Finance

Farm's market value

Farmland is cheaper to *own* in TLB

Although farmland ownership and operation in TLB is cheaper than greater Ontario, total capital market value per farm has greatly increased in most locations in the region



From 2016 to 2021, all TLB regions increased in average market value of total capital per farm. North Frontenac and Greater Madawaska were the regions to see the smallest increase, growing by approximately \$111,000 and \$61,000 respectively, while all other TLB regions gained at least \$212,000 dollars of growth in market value of total capital per farm.

Farm Finance

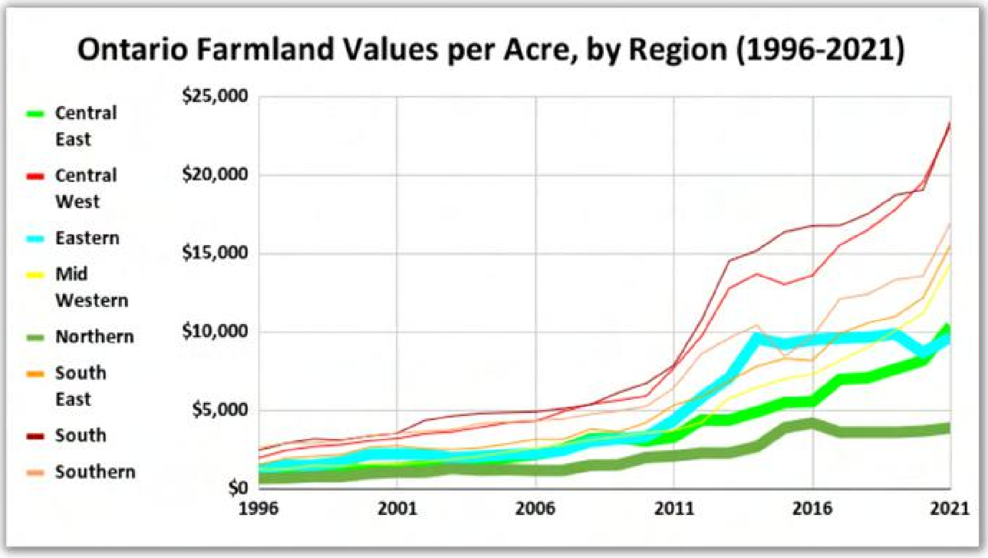
Farm's market value

Farmland is cheaper to *own* in TLB

The average value of farmland acreage in partially* ***TLB regions of Ontario in 2021 was $8,000.*** In ***other regions of Ontario, it was $18,740***

TLB regions=

- Central east
- Eastern
- Northern



Since 2019, TLB has included two of the cheapest farmland regions in southern Ontario, according to historical data from Farm Credit Canada.

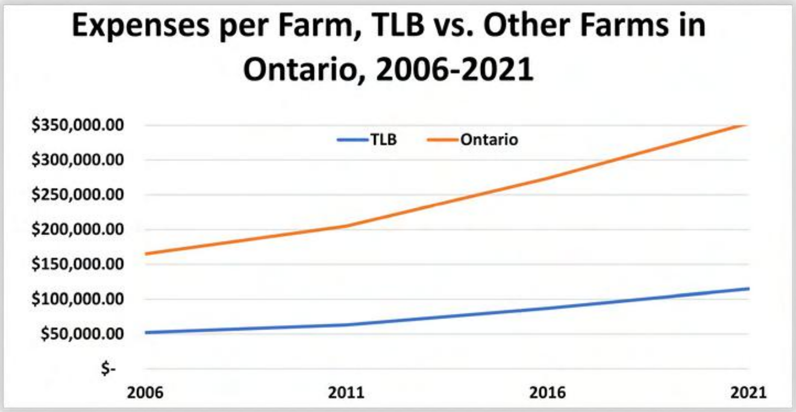
**Please note that this data is from Farm Credit Canada, not the Canadian Census of Agriculture. Therefore, this data does not come from the specific census consolidated subdivisions defined as TLB for the majority of this research, but rather comes from the 3 larger regions that make up TLB according to the regional breakdown used by FCC.*

Farm Finance

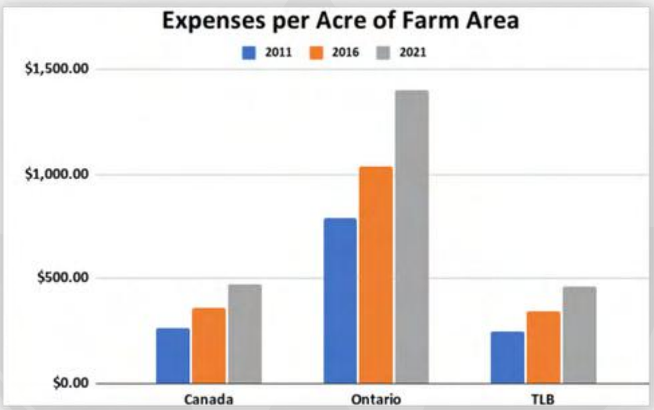
Cost of operation

Farmland is cheaper to *operate* in TLB

Farms in TLB ***cost over 50% less to operate per acre*** than the Ontario average



On average, TLB farms are spending over $238,000 less per year for operating expenses than most farms in Ontario. Between 2006 and 2021, the average operating expense for farms in Ontario grew nearly $126,000 *more* than the growth in average operating expenses of TLB farms.



7.92% of Ontario farms reporting expenses were in TLB in 2021. Despite this, TLB accounted for only 2.57% of Ontario's farm operating expense spending that year.

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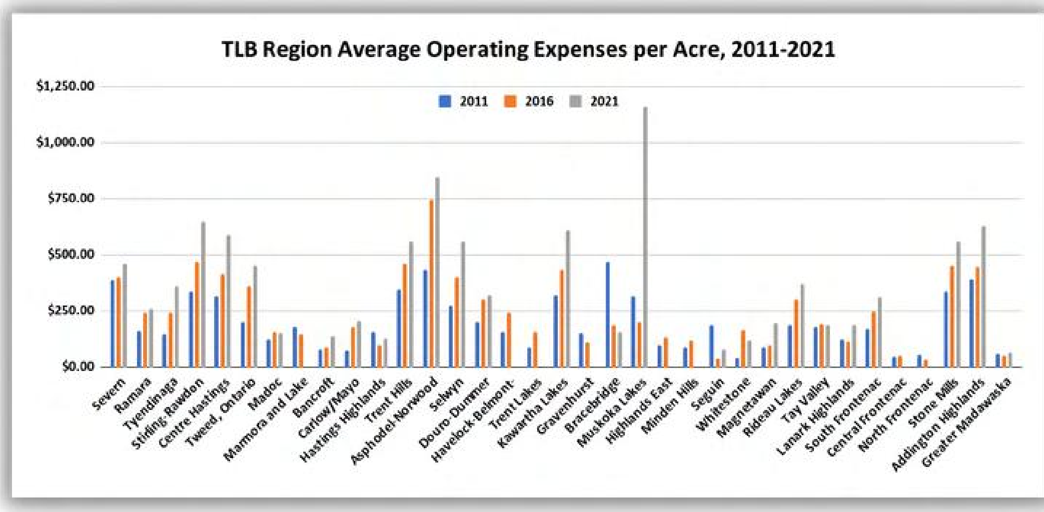
Cottage Country's Conservation Organization

Farm Finance

Cost of operation

Farmland is cheaper to *operate* in TLB

Farms in TLB ***cost over 50% less to operate per acre*** than the Ontario average



The average operating cost per acre in most areas of TLB is under $500. This $500 mark was surpassed in certain areas for the very first time in the 2021 census period. Only farms in Stirling-Rawdon, Centre Hastings, Trent Hills, Asphodel-Norwood, Selwyn, Kawartha Lakes, Muskoka Lakes, Stone Mills and Addington Highlands have an average operating cost of more than $500 an acre.

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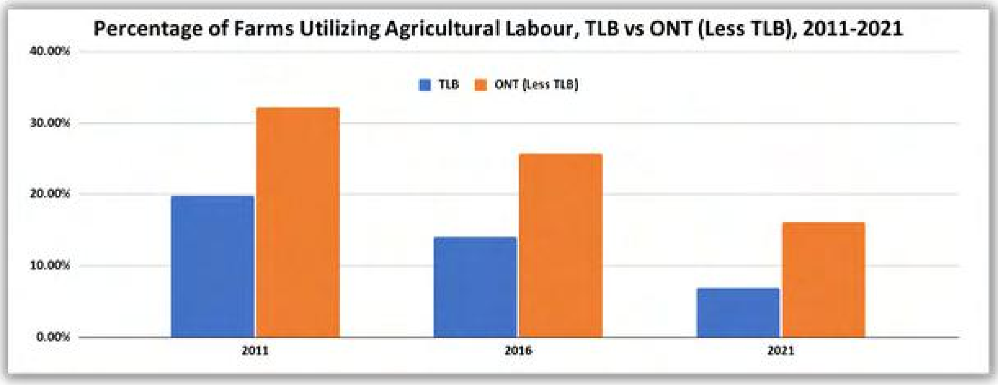
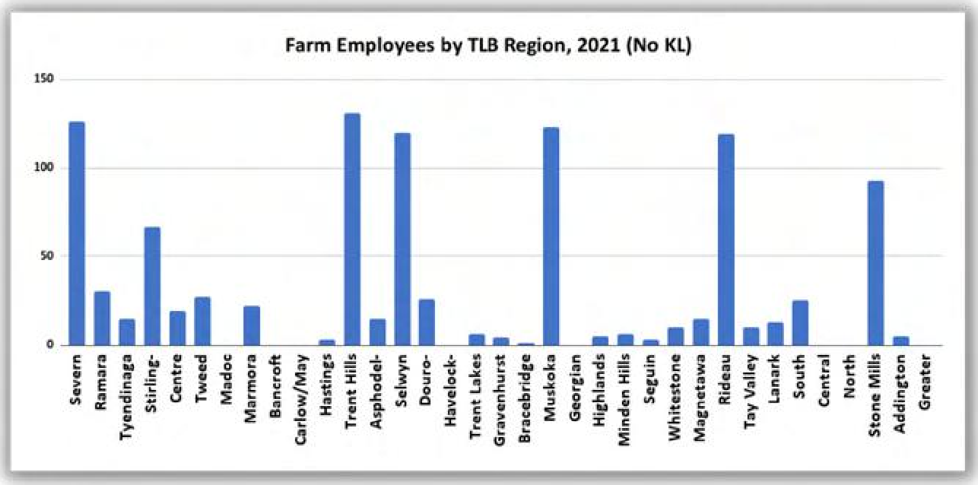
Farm Finance

Farm employees

TLB is losing farm employees

In 2021, TLB had ***only 7% of its farms report having employees***. This is less than the rate in greater Ontario, of 16% of farms having employees.



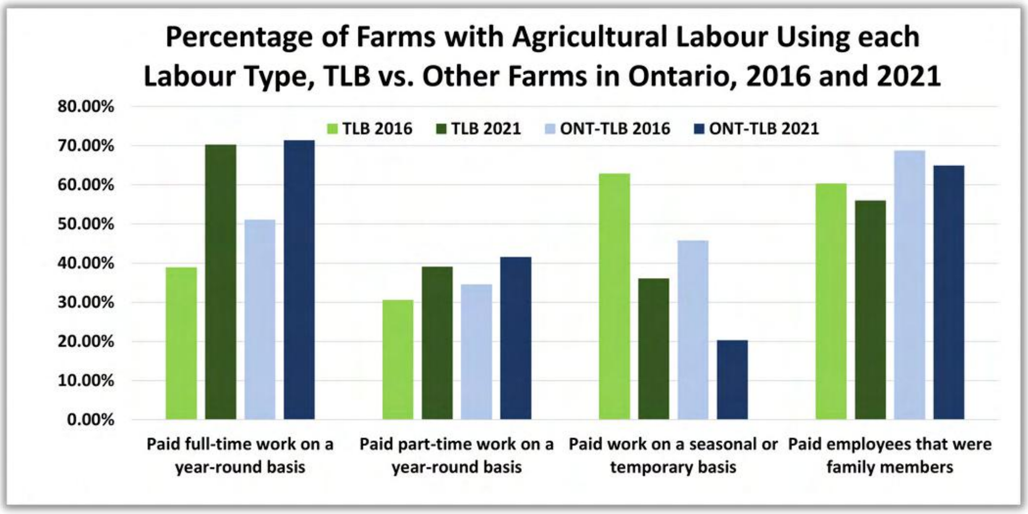


From 2011-2021 the amount of farms reporting employees in TLB had dropped by over 50% while the rest of Ontario, on average, had dropped by almost exactly 50%.

Farm Finance

Farm employees

TLB is losing farm employees



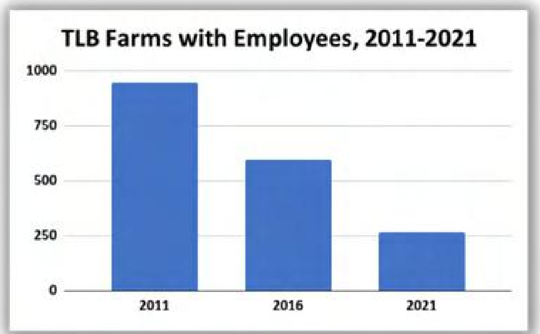
When comparing full-time vs. part-time agricultural labour in TLB to that of Ontario as a whole, part-time employees are more prevalent in TLB. In 2021, TLB had 104 farms employing 305 part time employees, accounting for 3.35% and 2.95% of the respective provincial totals. In that period TLB also had 187 farms, employing 482 full-time employees, which works out to 3.51% of the Ontario farms with full-time employees (a slightly larger percentage than farms with part-time employees), but only 1.97% of the province's full-time farm workers.

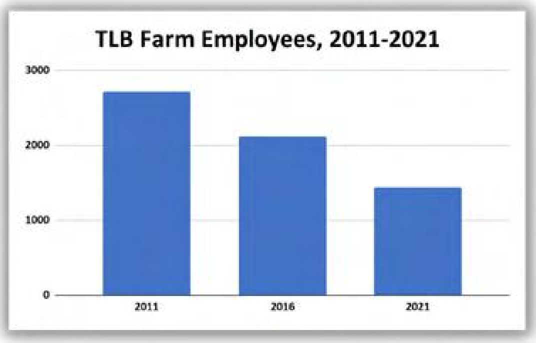
Farm Finance

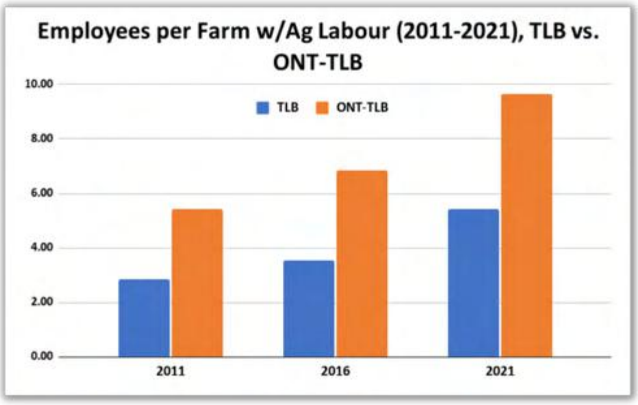
Farm employees

TLB is losing farm employees

From 2011-2021 there was a ***72% decrease in farms reporting employees,*** but average number of ***workers per farm reporting employees increased by 89%.***







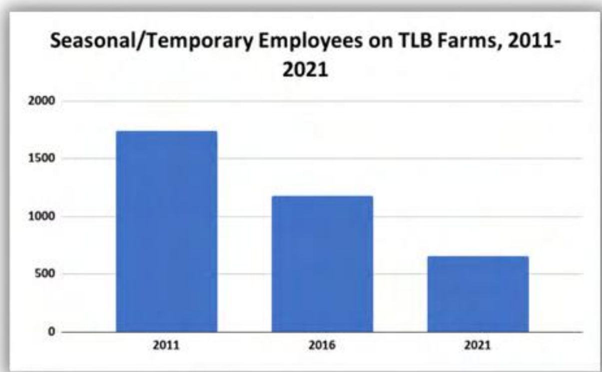
In 2011, 949 farms in TLB reported having employees, and by 2021 this dropped to 266 farms. In 2011, the average number of workers per farm in TLB was 2.9, and by 2021 it rose to 5.4.

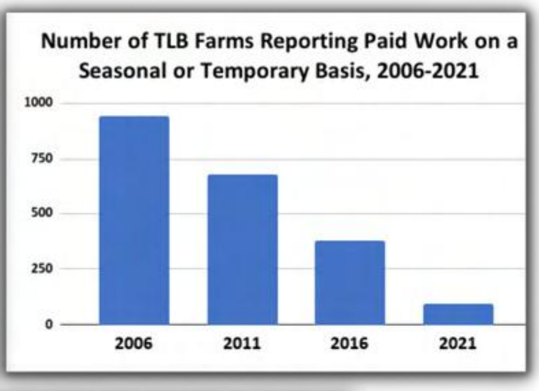
Farm Finance

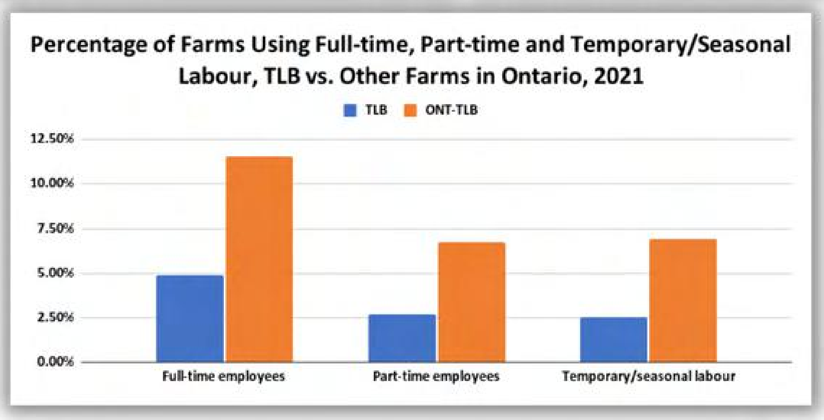
Farm employees

TLB is losing farm employees

The number of farms using temporary/seasonal workers ***decreased by 90%*** from 2006-2021 and was significantly lower than the Ontario average







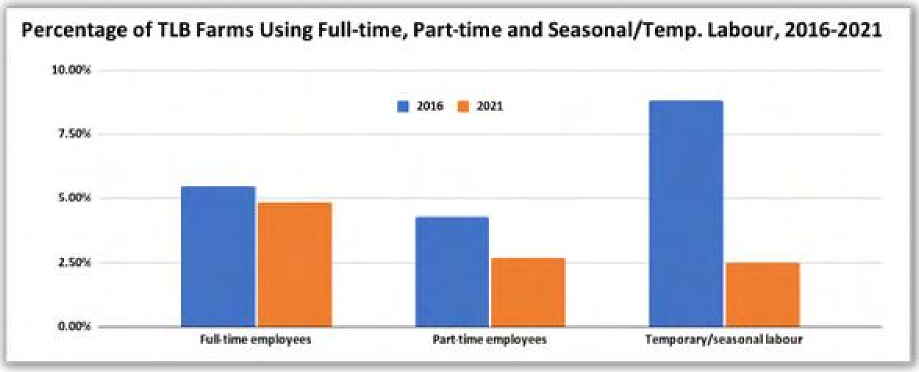
In 2006 there were 943 farms with temporary/seasonal agricultural labour and by 2021, this dropped to just 96 farms.

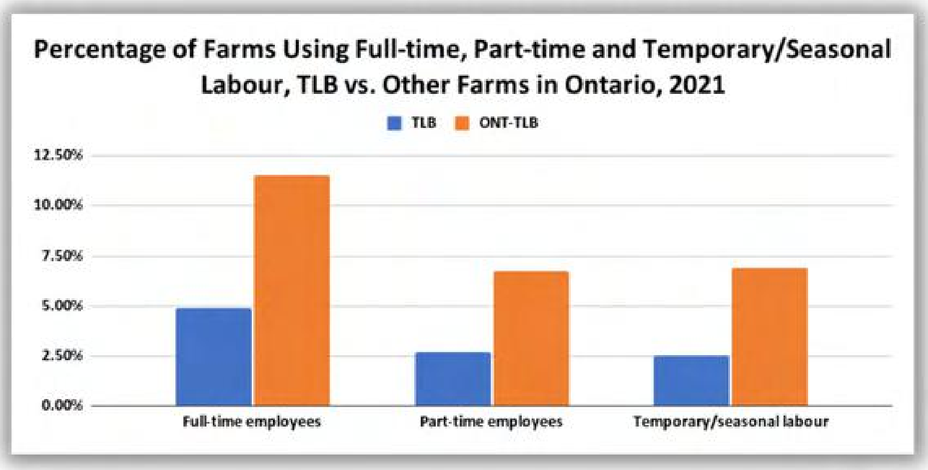
Farm Finance

Farm employees

TLB is losing farm employees

In 2016, ***38%*** of farms with employees in TLB hired full time workers. By 2021, this proportion increased to ***66%.***





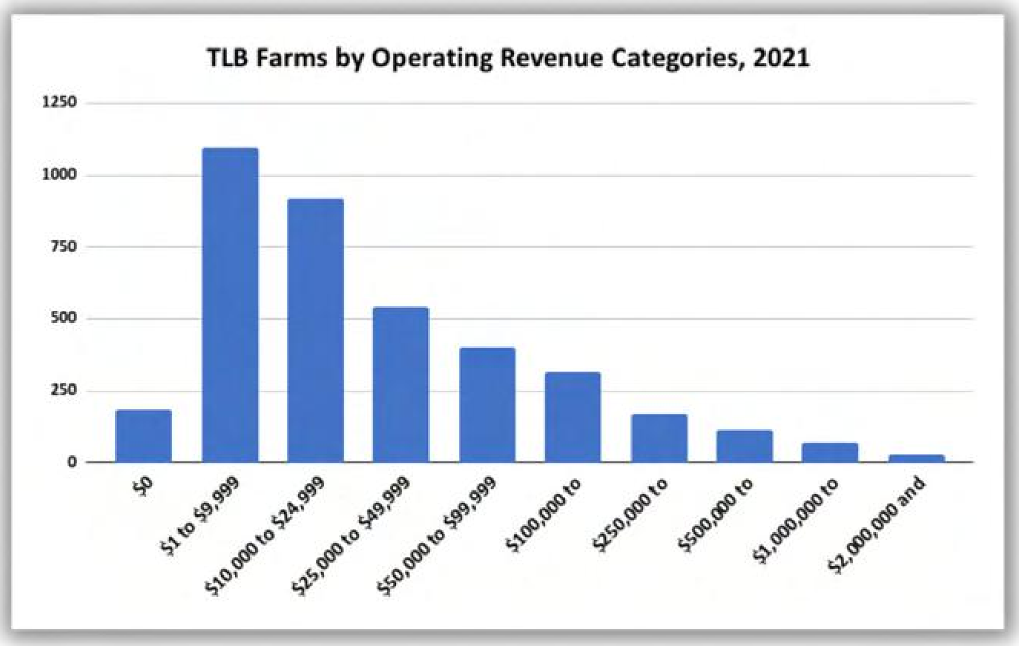
In 2016, out of the 2,118 farm employees in TLB, 498 were full time. By 2021, 482 employees were full-time, out of 1,439 total TLB agricultural employees

Farm Finance

Farm revenue

Most farms in TLB make $25,000 or less

57% of farms in TLB made under $25,000, while 18% made $100,000 or more in 2021



32% of the rest of Ontario farms made under $25,000, while 41% reported a revenue of $100,000 or more in 2021.

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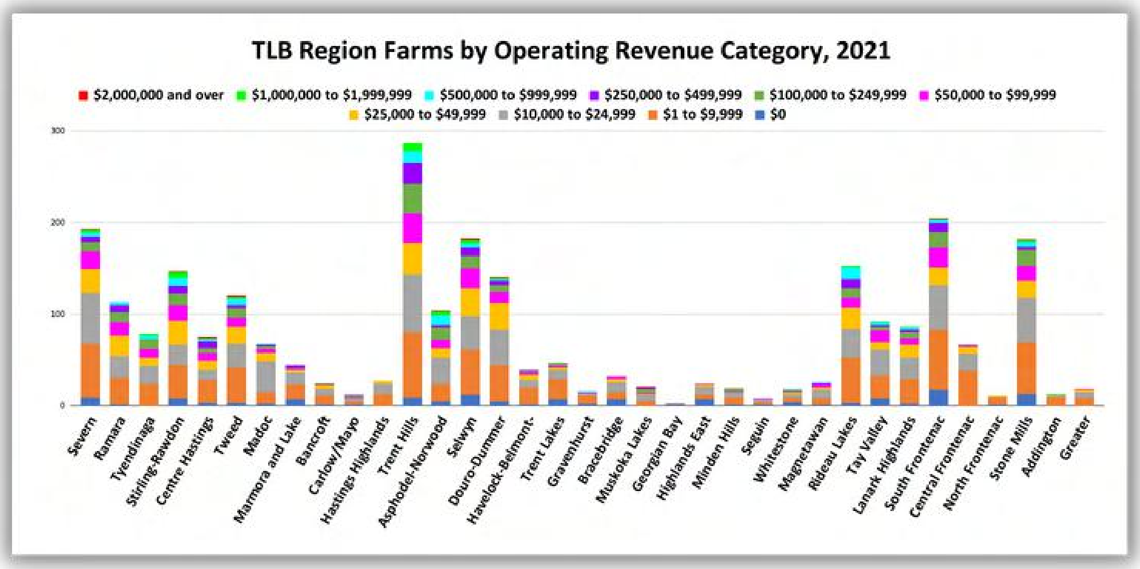
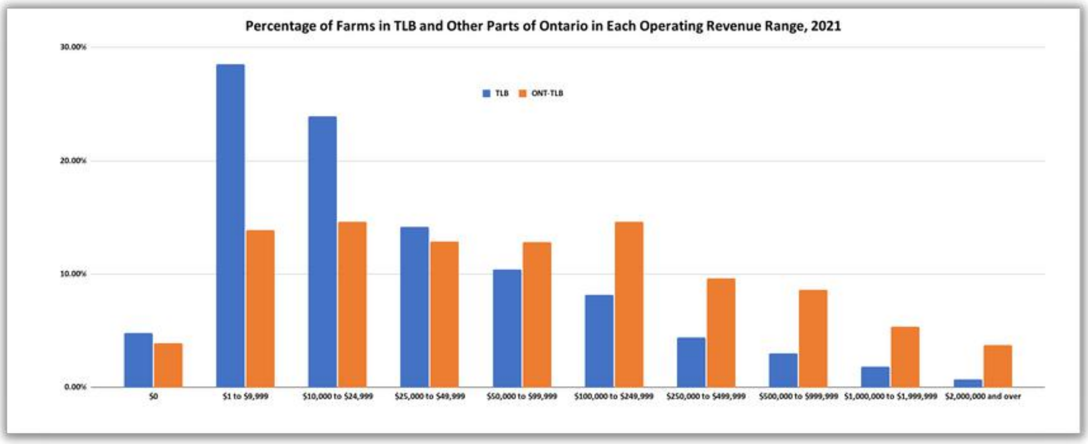
Farm Finance

Farm revenue

Most farms in TLB make $25,000 or less





Compared to other farms in Ontario, TLB had a larger percentage of its farms in the $0, $1-9,999, $10,000-24,999 and $25,000-49,999 operating revenue ranges, while there was a greater percentage of "other farms in Ontario" in all of the larger operating revenue categories

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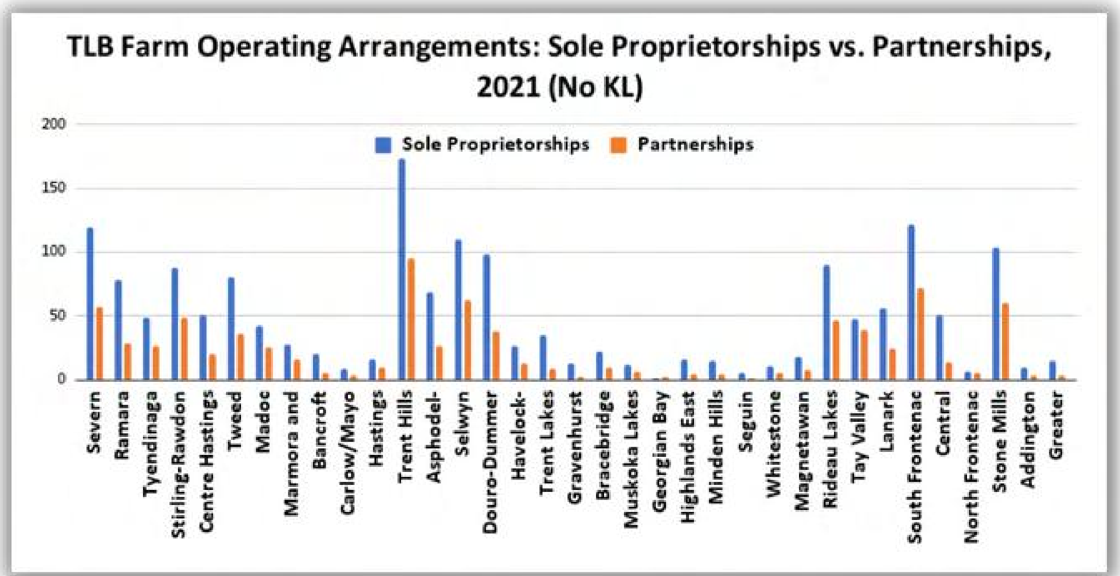
Farm Finance

Farm operating arrangements

Most farms are sole proprietorships

Most farming operations in TLB have only one owner

In 2021, 62% of farms were sole proprietorships and 31% were partnerships



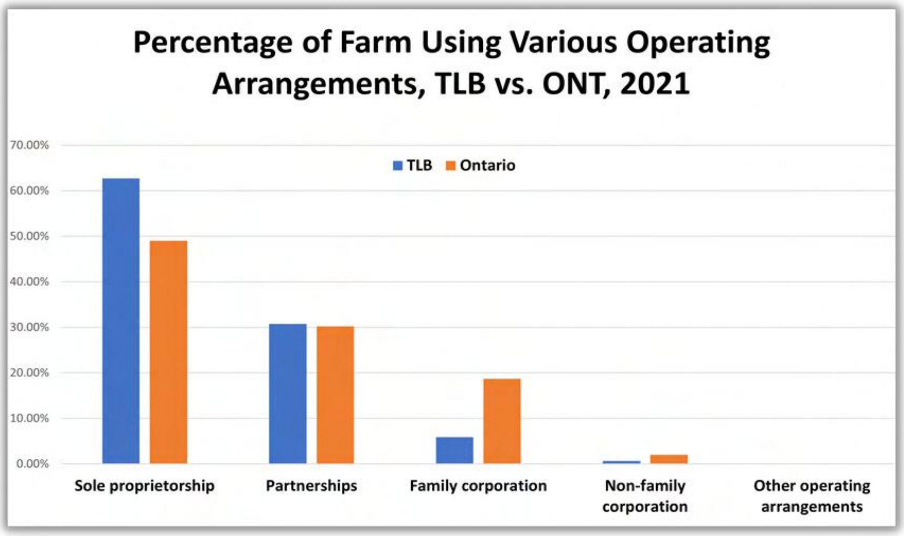
In 2021, 2410 farms were sole proprietorships and 1182 were partnerships. TLB had just 3 regions that increased in sole proprietorships from 2006 to 2021: North Frontenac (+3), along with Georgian Bay and Marmora and Lake (+1 each). As of 2021, all TLB regions had at least 2 farms using some form of partnership as their operating arrangement.

Farm Finance

Farm operating arrangements

Most farms are sole proprietorships

Most farming operations in TLB have only one owner



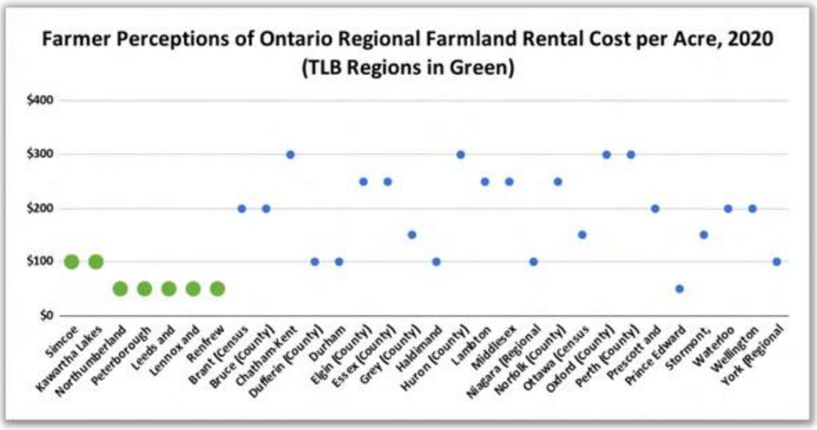
As previously mentioned, as of 2021, TLB had 2410 sole proprietorship farms and 1104 farms operating based on partnerships. While these categories are all down from their 2006 totals, those decreases are relatively in line with trends for the province overall. TLB had maintained 11% of sole proprietorship farms in the province for three consecutive census periods, before dropping to 10% in 2021.

Farm Finance

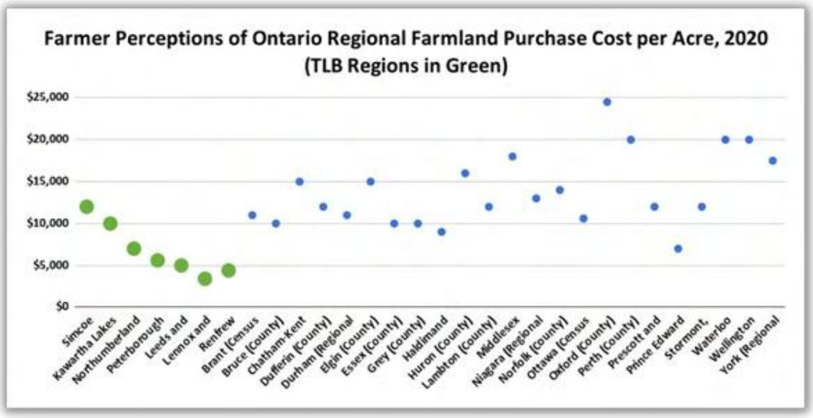
Farmer Surveys

Farmland in TLB is perceived to be some of the least expensive in Ontario

Farmers perceive both rental and purchase prices of land in TLB regions (that they are familiar with) to be some of the lowest in the province



Prince Edward County is the only non-TLB region with a perceived rental cost per acre under $100



Deaton, Jr., B. (2016-2020). Ontario Farmland Value and Rental Survey. Guelph, Ontario: University of Guelph.

Kawartha Lakes and Simcoe (most south-western regions of TLB) are the only TLB areas with a perceived farmland purchase price at/above $10,000 per acre.

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06

Our key takeaways

What have we learned?

Key takeaways from our research

Summary of our research findings

1. TLB is losing farmland, farmers and farm employees at an alarming rate

2. TLB's historically dominant farm types of dairy, beef and hay are seeing dramatic decreases

3. Livestock farms are decreasing, but animal numbers per farm are intensifying

4. Cash/export oriented crops are becoming more prevalent

5. Vegetable & fruit growing, greenhouses, mushrooms & organic products are becoming more popular

6. It is significantly cheaper to own and operate a farm in TLB compared to the rest of Ontario

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Our key takeaways

What we have learned

TLB's and Ontario's food security is under significant threat

We are losing farmers, farmland, increasingly growing food for export and importing significant amounts of food from other countries to feed Ontarians

Ontario is farming less, with fewer farmers, yet is growing in population. Instead of using our fertile farmland to grow food that Ontarians actually consume, the majority of the land is being used for export oriented cash crops. This method of farming is typically extremely expensive to get into and taxing on the environment, with equipment costing hundreds of thousands of dollars to buy and even more to maintain and copious amounts of fertilizers and pesticides running off into our waterways. In addition, increased development in southern Ontario has driven up the price of farmland to a level where it is completely unaffordable for new farmers to purchase.

Development of farmland in southern Ontario jeopardizes the future of food security for the region and its growing population. As development continues, access to rich agricultural landscapes will be even more out of reach. This will force farmers, and the Ontario food industry, to increasingly look further and further away for quality farmland. Currently, the potential for food sovereignty in Ontario exists, however for this to occur we need significant reform within our agricultural systems.

One solution to improve food security in Ontario is to revitalize the agricultural heritage of the Land Between region. This region, which is commonly referred to as Ontario's cottage country, has many unique characteristics that have been utilized by settler residents to support agriculture for hundreds of years, and will also allow it to develop into an Ontario food security hub. In the following section, we will expand on the characteristics of TLB that create this potential.

07

The Land Between region as a solution to Ontario's food security concerns

Why the Land Between region?

Why is TLB an agricultural solution?

A promising future for food security

TLB has healthy, intact natural systems which support ecosystem services

TLB still has *healthy ecosystems*

This allows the region to preform vital ecosystem services that are essential to greater southern Ontario. Intact ecosystems services enhance agriculture and help to reduce costs associated with farming.

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Why is TLB an agricultural solution?

A promising future for food security

Healthy nature is not the only reason, but one of many...

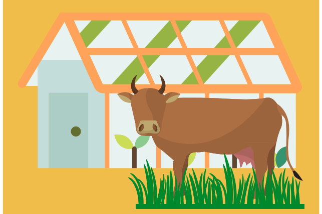
Nature

TLB's healthy environment provides many ecosystem services to farmers

Culture

Long heritage and culture of adaptation and entrepenurial spirit in farming

Capacity



Land well suited for pastured livestock, hay and animal feed, and greenhouses

Cost

Purchasing and operating a farm is significantly cheaper than ON average

TLB is a strong solution for a food secure future because of its nature, culture, capacity and costs

The Land Between holds promise for a food secure future due to many reasons. The healthy natural systems allow for ecosystem services to thrive such as water filtration, flood attenuation and pollination. Such ecosystem services are extremely expensive to replicate with human made infrastructure, but the Land Between's ecosystems are able to provide them free of charge (as detailed on the previous page). The long heritage of farming in the Land Between also makes it a promising choice! Throughout settler history in the region, farmers have had to adapt their traditional farming practices to a new, dynamic and challenging landscape. This has resulted in a farming community and culture that is both adaptable and resilient. The Land Between also has the capacity for many profitable forms of agriculture; however, due to decreasing number of farmers (and other factors), much of this capacity is going underutilized. Moreover, purchasing and operating a farm in the Land Between region is 50-60% less expensive than almost all other regions in southern Ontario.

Realizing a food secure future

Promising solutions to food security issues

There are many *solutions (listed in the paragraphs below)* that we can employ to help ensure a food secure future & combat the major food security threats identified:

- Supply chain control
- Trade agreements & supply chain disruptions
- Global population growth
- Climate change, water scarcity & pollution
- Transition to cash crops
- Development of farmland
- Lack of young farmers
- Loss of natural areas

Policy that supports farmers, local food systems and healthy communities

Strong policy

Policy is an extremely powerful influencer of food security. Changes to food, trade, development, and other relevant policy sectors, at any level of government, can have tremendous impact on food security and local economies. Meaningful changes to policy would help to combat all eight major threats that we have highlighted: supply chain control; global population growth; trade agreements and supply chain disruptions; climate change, water scarcity and pollution; transition to cash crops; development of farmland; lack of young farmers; and loss of natural areas.

Nature based solutions to agriculture, infrastructure and social issues

Nature based solutions

Nature based solutions are those that use natural systems and features to solve problems in economical and effective ways. Nature based solutions such as constructed wetlands, buffer strips, and hedge rows are relatively cheap solutions that help to increase water quality, air quality, water filtration, natural pest control and reduce pollution. Employing nature based solutions helps to combat many food security threats including: climate change, water scarcity and pollution; transition to cash crops; and loss of natural areas.

Realizing a food secure future

Promising solutions to food security issues

Re-normalize agroecology, intercropping and diverse cropping

Agroecological practices, such as intercropping, help to keep soils, crops and the surrounding environment healthy while also generating high yields. In North America since the green revolution, this form of agriculture has experienced severe decline in practice and minimal funding for research. Re-normalizing this form of agriculture would increase the resiliency of local food systems, especially in a future of increasing climate change. This solution combats food security threats such as: climate change, water scarcity and pollution; supply chain disruptions; and transition to cash crops.

Renormalize agroecology

Protect and preserve farmland

Farmland is being developed at an alarming rate, especially in southern Ontario. Preservation of this farmland is vital to enduring food security and future generations of Ontarians because it is some of the highest quality farmland in Canada. This solution combats food security threats such as: global population growth, supply chain disruptions; development of farmland; and lack of new and young farmers.

Protect farmland

More research on & utilization of adaptive farming practices

More research needs to be conducted on general agroecological farming practices, permaculture and regenerative agriculture. Current research funding opportunities are dominated by research that only supports (or minimizes the damage of) the current industrial, extractive model of agriculture. This solution combats food security threats such as: supply chain disruptions; and climate change, water scarcity and pollution.

Adaptive farming research

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Realizing a food secure future

Promising solutions to food security issues

Encourage and support new and young farmers

Young people are increasingly choosing not to be farmers. This, combined with few new farmers, an aging farmer population and a severe lack of succession planning in Ontario, is very alarming for food security and begs the question: "What will happen when all of the farmers retire?". In order to combat this, we need more supports for new and young farmers. This support needs to be multidimensional and address topics such as training, financing, marketing and business. This solution combats food security threats such as; supply chain disruptions; development of farmland; and lack of new and young farmers.

Focus on community food security

Reliance on complex global supply chains has exposed many communities to food insecurity. When these supply chains become disrupted, the inequality of food access/distribution is increased, and communities lose stable access to healthy food. By focusing on community-level food security, we can ensure that, no matter how remote or economically disadvantaged, communities always have the ability to feed themselves, through a stable network of local food trade. Focusing on community food security combats threats such as: supply chain control and disruptions; global population growth; climate change, transition to cash crops; development of farmland and lack of young farmers.

08

What The Land Between Charity Plans to do For a Food Secure Future

Our Project: Feeding the Land Between and Sustaining Ontario

Feeding the Land Between

Building a network for farmers & communities

OUR VISION

To build and empower a regional network to take action and increase capacity resulting in enduring food security (in the Land Between and therefore, Ontario)

Our plan?
Phase 1: Foundational Capacity

Advancing Food Security in Ontario and feeding The Land Between

1. Host stakeholder input & networking sessions
2. Create connections to build capacity
3. Identify opportunities & priority actions
4. Create local action plans & a dynamic regional strategy
5. Execute priority actions, promote farming & revitalize farming heritage

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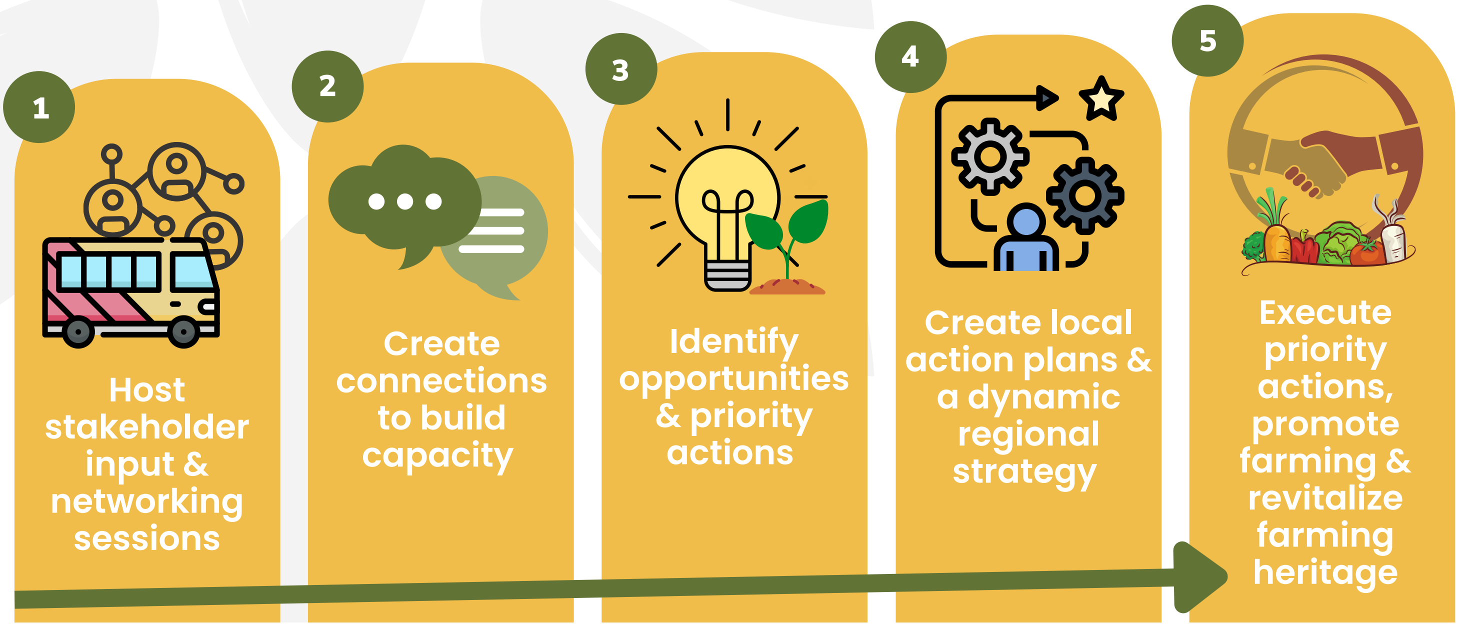
Feeding the Land Between Phase 1

Advancing Food Security in Ontario



1 Host stakeholder input & networking sessions

Our Feeding the Land Between team will travel across the region to host several networking sessions that include important stakeholders such as: farmers, distributors, market organisers, municipalities, businesses, young people, not-for-profits and concerned community members.

2 Create connections to build capacity

By hosting these events we will create a space for food security stakeholders to form connections. These connections will help to build capacity within the community because each individual will now have more outlets for learning and asking questions.

3 Identify opportunities & priority actions

Through network session facilitation and the connections they develop, we will work together with stakeholders to identify and prioritize promising opportunities for advancing food security.

4 Create local action plans & a dynamic regional strategy

Using this list of promising opportunities and priority actions, we will developed an informed, comprehensive and evidence-based plan for enhancing food security across TLB region.

5 Execute priority actions, promote farming & revitalize heritage

By executing our strategic plan we will help to enhance agricultural capacity, adaptation and networks across the region. Together, these outcomes will aid in reinvigorating the strong culture of farming heritage and resiliency across the region.

Feeding the Land Between

Building a network for farmers & communities

Key Pilot Outputs

Municipal food charters

Comprehensive marketing plans

Maps of existing farms and farm potential

List of district assets and strategies

Maps of market accessibility

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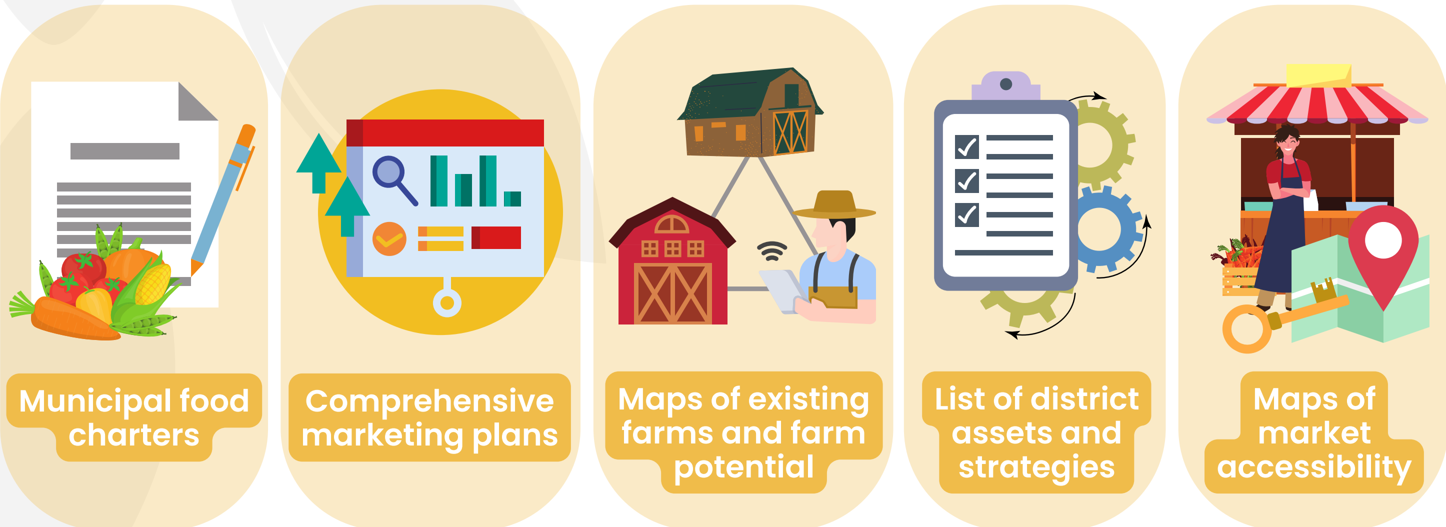
Outputs of our plan

What we will accomplish in Phase 1



Municipal food charters

TLB region needs more municipal food charters. Currently, TLB only has 8 areas with accepted charters and few aspects of food security are considered in more common planning documents, such as official plans. We will help to propel the creation and adoption of such charters.

Comprehensive marketing plans

Marketing agricultural products is often an obstacle for farmers who want to enter local markets. One of our outputs will be the creation of marketing plans that help farmers reach these markets, with specific adaptations for the TLB context.

Maps of existing farms and farm potential

By creating this set of maps we will have a better idea of how agricultural areas are changing and what their capacity is to enhance food security now, and in the future.

List of district assets and strategies

Many different townships and communities have diverse landscapes, extension services, adaptation methods and farming practices that could help other individuals. By creating a list of these assets and strategies we will help to make this important information available to farmers across the entire TLB region.

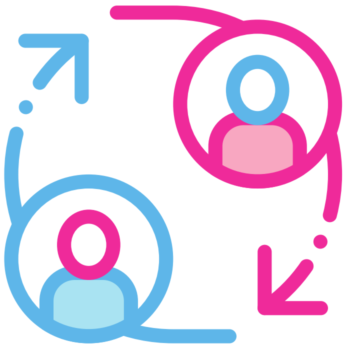
Maps of market accessibility

A common complaint from farmers is that they do not know where or how they can get their products into different markets. Understanding regional nuances, markets and distribution channels will help us better discern and strategize how to overcome market accessibility issues.

We need *your* help to improve our food security!

Help contribute to making our dream of food secure communities in Ontario a reality!

Donate



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Haliburton, ON K0M 1S0

The Land Between:

Hope for a *food secure* Ontario!

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