

Wellington County Farmland and Agri-food System Study

Presentation to Wellington County Council
September 28, 2023

WILTON
CONSULTING GROUP

WFA

Wellington
Federation of
Agriculture

Today

Key Findings

Q&A



Key Findings

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- Wellington County has a thriving agri-food system that contributes \$2.8 billion to Canada's GDP and more than 35,900 jobs
- Wellington County is a powerhouse in field crop production, livestock production and processing, value-added activities, and agriculture inputs and services
- Now more than ever, we must understand and communicate the value the agriculture and agri-food system has for the economy, environment and society

What is a farmland and agri-food system study?

Intended Outcome

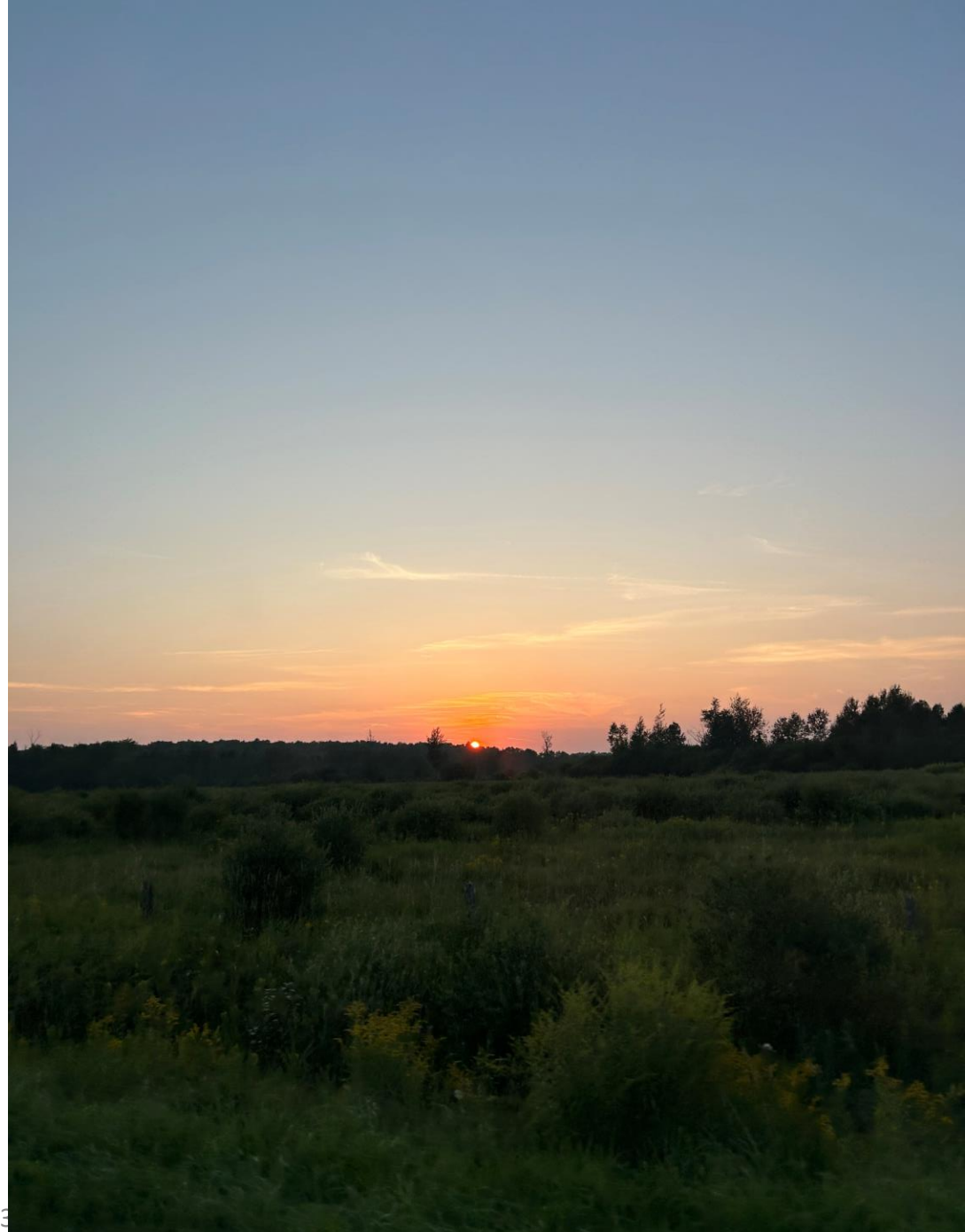
- To understand the value that agriculture and the agri-food system brings to Wellington County from economic, social, and environmental perspectives.

Methods

- Literature Review and Data Analysis

Economic Impact Analysis - input
output model

Engagement



Wellington County's Agri-Food System's Economic Contribution:

\$2.8 billion

to Canada's GDP, which is 5.0% of the Ontario agri-food industry's \$56 billion contribution.



Wellington County's Agri-Food System's Economic Contribution:

35,943 jobs

to the Canadian economy, nearly two thirds of which are in the food manufacturing and retail portion of the value chain



Wellington County's Agri-Food System's Economic Contribution:

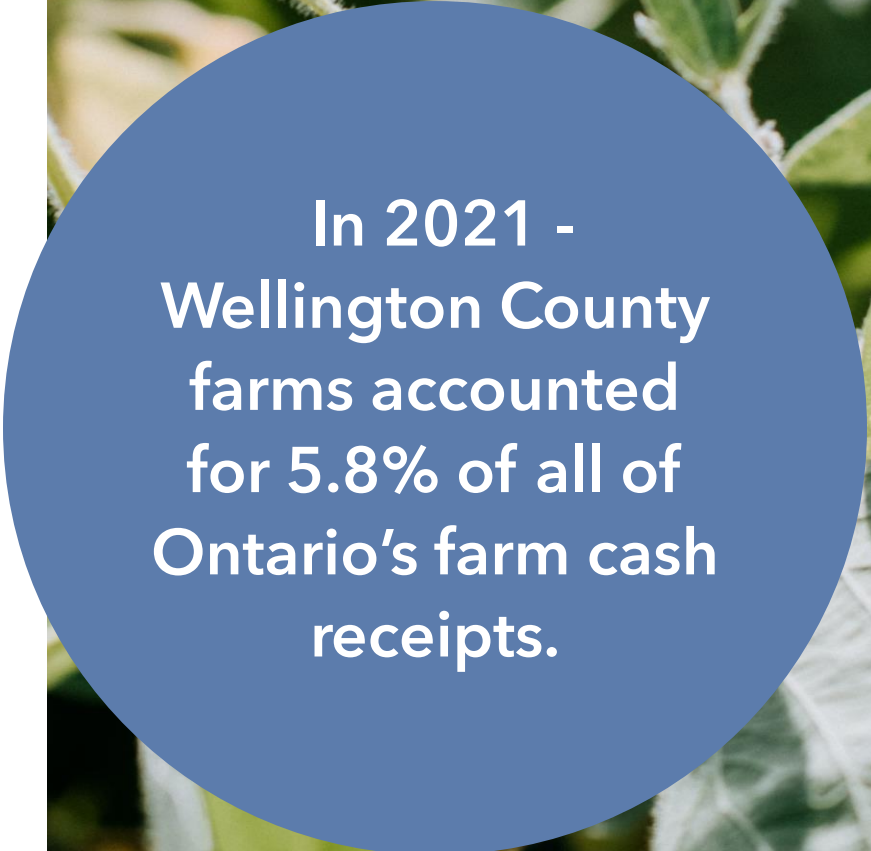
\$496 million

in labour income within farm and upstream jobs.



Primary Agriculture Economic Contribution

- More than **\$841 Million** to Ontario's GDP
- Supports a total of **12,260 jobs** (6,556 full-time equivalent employees)
- For every dollar spent on local Wellington County agricultural products, **\$2.36** of activity is generated within Canada
- Wellington County's agricultural sector generates a total of **\$79 million** tax revenue for the provincial and federal government



In 2021 -
Wellington County
farms accounted
for 5.8% of all of
Ontario's farm cash
receipts.

Primary Agriculture

Wellington County is a leader in field crop production

- Wellington County covers only 0.2% of total land area in Ontario, it supports 5% (418,296 acres) of the province's acreage of field crops
- Wellington County produces 4% of the province's soybeans and corn, and 7% of the province's winter wheat
- Wellington County accounts for 3% of Ontario's total prime agricultural land

Quick Facts

- 60% of Wellington County's soils are Class 1
- 81% of Wellington County's soils are Class 1-3

Wellington County is home to:



29,650 (10%)
acres of Ontario's corn for silage



4,365 (5%)
acres of Ontario's oats



5,633 (9%)
acres of Ontario's mixed grains



83,411 (5%)
acres of Ontario's hay



5,710 (8%)
acres of Ontario's barley



116,923 (4%)
acres of Ontario's soybeans



80,307 (7%)
acres of Ontario's winter wheat



92,169 (4%)
acres of Ontario's corn for grain

Agri-Food Processing and Value-Added Activities

Wellington County's Agri-Food Processing, Value-Added and Retail Activities

- Contribute more than **\$1.08 Billion** to Ontario's GDP
- Support **23,360** jobs

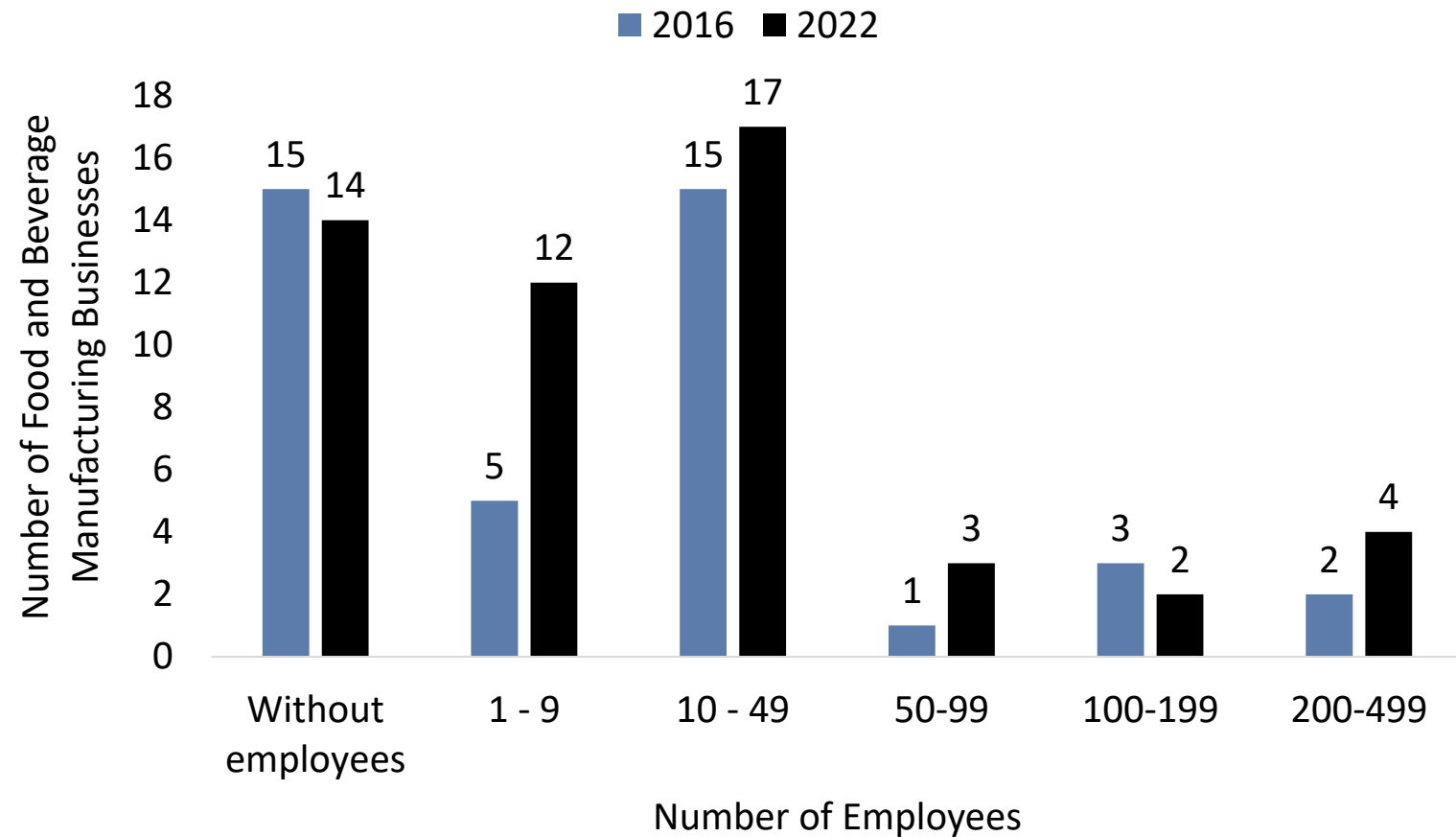
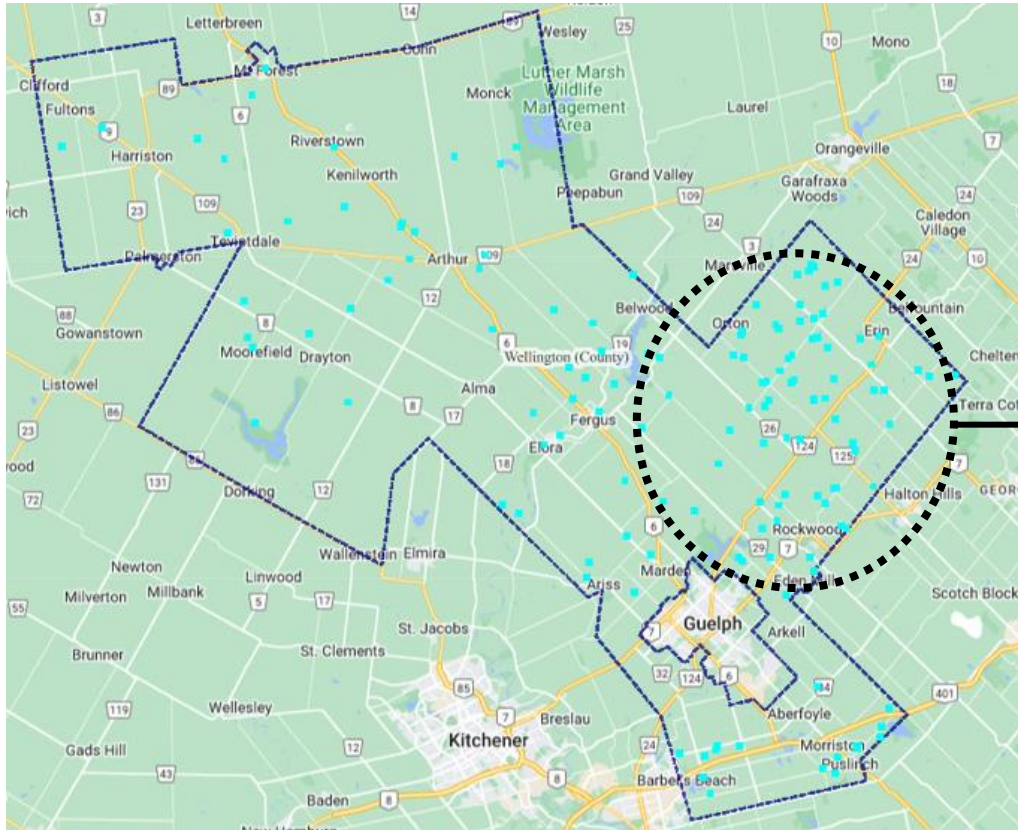


Figure 18. Food and beverage manufacturing businesses in Wellington County from 2016-2022. Note: This does not include agritourism or food and beverage retail businesses. Source: [Ontario Ministry of Agriculture, Food and Rural Affairs](#).

Value-Added Activities

Wellington County has a strong equine sector: It is home to the highest number of horse and other equine farms than any other municipality in Ontario.



Equine businesses are concentrated in Eastern Wellington County – near Rockwood and the Town of Erin. The equine sector includes:

- 13,533 horses*
- Part of the County’s heritage
- World class equine sport facilities
- Equine recreation facilities
- Nearby educational programming in equine management



Agri-Food Processing and Value-Added Activities

Powerhouse in Livestock Production and Processing

- Wellington County hosts both provincially and federally licensed abattoirs, meaning livestock farmers have options for processing depending on whether they are selling to local Ontario markets, or nationally/internationally

There are two abattoirs in Wellington County and one nearby in the City of Guelph that serve Canadian and international export markets.

This means that beef, poultry, and other animal protein products produced in Wellington County feed Canada and the world.

Wellington County is home to:



374 (12%)

of Ontario's dairy cattle and
milk production farms



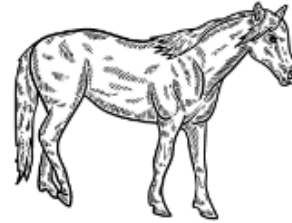
93 (7%)

of Ontario's sheep and goat
farms



205 (10%)

of Ontario's poultry and egg
production farms



167 (7%)

of Ontario's horse and other
equine production farms



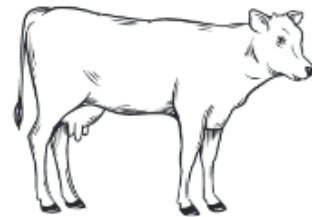
101 (8%)

of Ontario's hog and pig farms



147 (7%)

of Ontario's "other" animal
production farms



503 (6%)

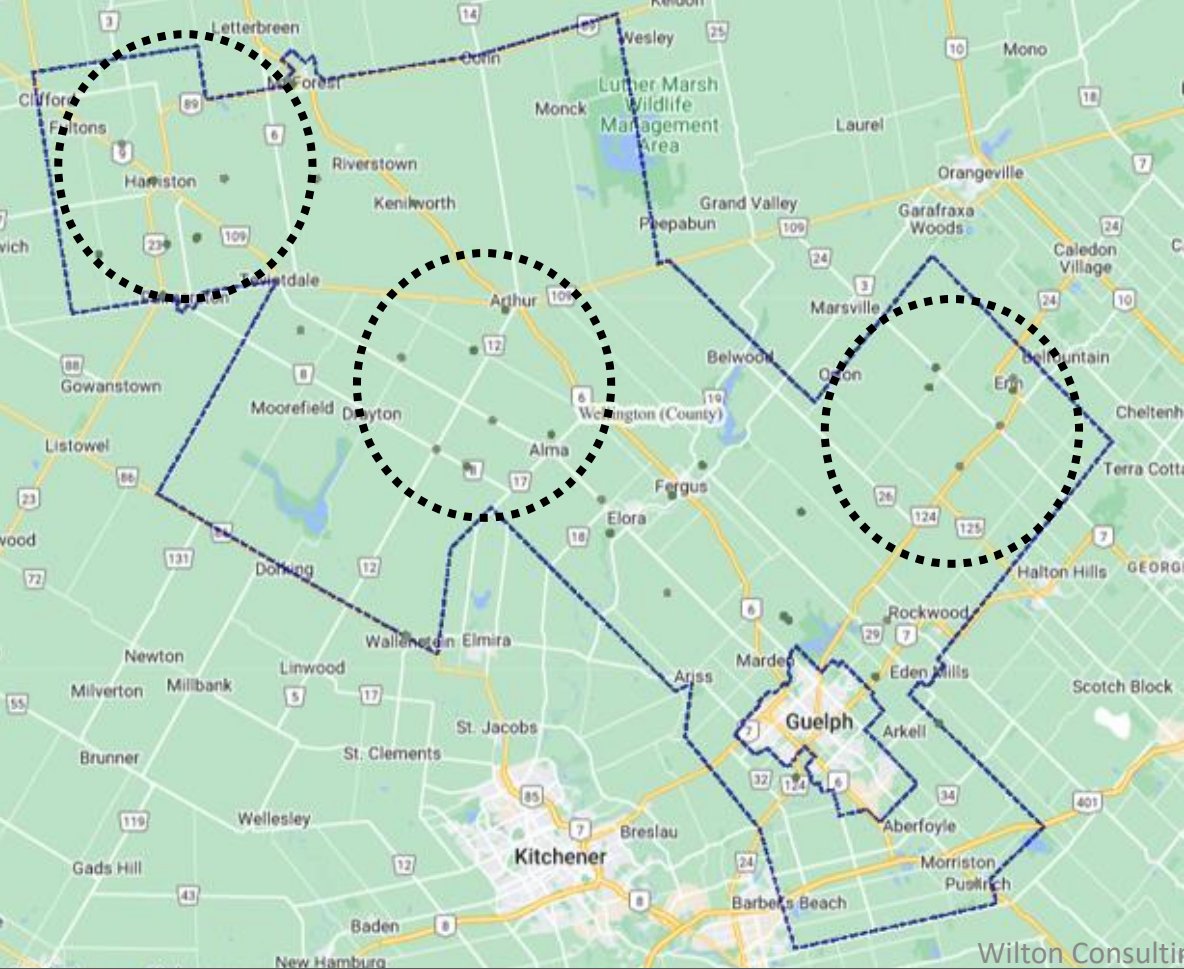
of Ontario's beef cattle ranches
and farms

Agriculture Sector Inputs and Services

Compared to other municipalities of similar size within the Greater Toronto Area, Wellington County has a thriving agri-business sector

Employees	Wellington*	Waterloo*	Halton*	Dufferin
No employees	119	60	12	28
1 - 9	23	10	2	7
10 - 49	14	4	2	2
50-99	9	27	7	7
100-199	0	0	0	0
200-499	2	1	1	2
500+	1	0	0	0
TOTAL	168	102	24	46

Agriculture Sector Inputs and Services



Agri-food value chain input retail businesses are distributed across the County – making it convenient for Wellington County farmers to access the inputs needed to operate successfully.



Challenges and Opportunities

Wellington County's Growing Population

Challenges:

- ✓ Increased interactions between the public and agriculture that may lead to conflict
- ✓ Balancing needs of residential development with agricultural sector growth

Opportunities:

- ✓ Supporting local Fall Fairs and Ag Societies
- ✓ Supporting opportunities to educate school-aged children and youth
- ✓ Boost the local food economy (e.g., TasteReal initiatives including the Rural Romp, marketing)

A photograph of a pumpkin patch with many pumpkins scattered across a field of dry straw. The pumpkins are in various stages of ripeness, with some being bright orange and others still showing green. The background is slightly blurred, emphasizing the pumpkins in the foreground.

“Our strength (access to consumers) is also a weakness -since we are so close to urban a lot of people are so disconnected even if they are close to the farm.”

- Interviewee

Protecting Wellington County's Soil

Challenges:

- ✓ Once paved over, we cannot harness the economic, social and environmental benefits of soil
- ✓ Class 1-3 soils are a non-renewable resource

Opportunities:

- ✓ Promote soil health BMPs across the sector in Wellington County
- ✓ When making planning policy decisions, consider the value of farmland as an economic driver, provider of EG&S and a non-renewable resource

County Council: Playing a Key Role in Protecting Wellington County's Soil

When making planning policy decisions, consider the value of farmland as an economic driver, provider of EG&S and a non-renewable resource

Examples of how the County can leverage this opportunity:

- An Agricultural Advisory Committee could provide input into key County decisions related to agricultural land and agricultural economic development
- Ensuring agricultural impact assessments are used as a “pulse check” for smart growth

Growing Entrepreneurship in Agriculture

Challenges:

- ✓ Cost of farmland is high; new entrants to agriculture, and new generations entering agriculture are challenged with high start-up costs
- ✓ 40% of Canada's farmers are expected to retire by 2033
- ✓ Just 11% of Wellington County's farm businesses have a written transition plan

Opportunities:

- ✓ Continue to foster entrepreneurial opportunities for new farmers in Wellington County including – new farmers, new farm components (e.g., agritourism), new Canadians, and the next generation
- ✓ Support efforts to help with on-farm transition planning

Key Findings

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- Now more than ever, we must understand and communicate the value the agriculture and agri-food system has for the economy, environment and society

A close-up photograph of a field of lavender flowers. The flowers are in various stages of bloom, with some showing their characteristic purple color and others as buds. The background is a soft, out-of-focus blue sky. A dark grey rectangular box is centered over the image, containing the text "Thank you! Questions?".

Thank you!
Questions?

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