



Dufferin Economic Data Collection & Analysis

Team Dufferin Seminar

Dufferin County

—
December 15, 2025



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Project Objectives and Outcomes



Objectives

- 1. Establish Economic Baseline:** Gather primary and secondary data to develop a detailed picture of Dufferin's current economic conditions, including key sectors, workforce trends, and vulnerabilities.
- 2. Support Local Businesses:** Analyze economic pressures such as workforce trends, supply chain risks, and trade vulnerabilities to inform targeted interventions for long-term business sustainability.
- 3. Equip the County for Evidence-Based Decision-Making:** Deliver an informative economic profile on the County to support policy development, strategic planning, and implementation.



Outcomes

- 1. Economic Data Profile:** A report summarizing local economic dynamics, sector trends, and development pressures, forming the foundation for future planning.
- 2. Actionable Strategy Framework:** Which will include recommendations for how the County can better support local businesses with adapting to economic uncertainty.

Dufferin's current economic state

Agriculture in Dufferin

157,389

Acres of farmland

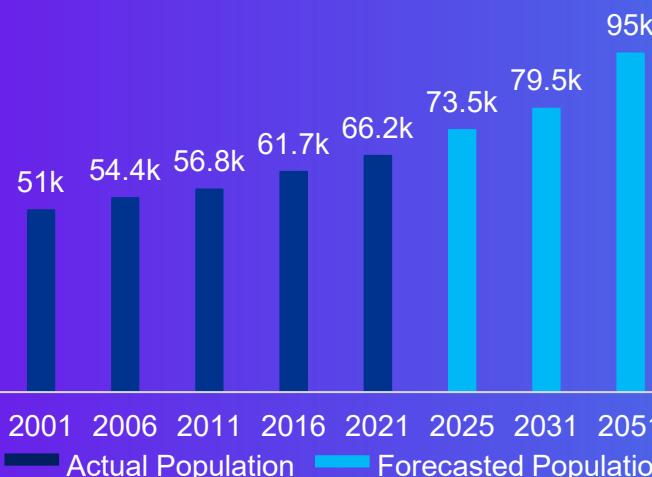


\$428 m

GDP contribution from farm cash receipts



Dufferin Population Trends



Dufferin is experiencing unprecedented growth

- Dufferin's population is growing rapidly and is projected to **reach nearly 100,000 by 2051**.
- Supporting this growth requires significant investment in housing and infrastructure.

Agriculture underpins Dufferin's diverse economy

- With prime soils and rural geography, **agriculture has historically been and remains a key sector**.
- As the County evolves, several sectors are expanding to complement agriculture including **manufacturing, construction, tourism, and retail services**.

Dufferin is strategically situated in Ontario

- Dufferin's proximity to the GTA with quick access to transport routes positions the County as a **strong hub for trade**.
- New infrastructure investments include up to \$9.5 Million in **highway upgrades and new roadways** (Highway 410/10 interchange, a tri-country rural transit network for Grey-Bruce-Dufferin, and indirectly Highway 413) to further bolster this connectivity.



Dufferin's population is forecast to grow ~40% between 2021 and 2050, driven by sustained in-migration and regional housing demand. This long-term growth will place increasing pressure on municipal services, infrastructure, and land-use planning.

Emerging Economic Pressures & Uncertainties

Dufferin County's economic landscape is being affected by post-pandemic disruptions, global trade uncertainty, and rising fiscal pressures on local governments.

Trade & Tariffs

Ongoing trade and tariff threats from the US continue to create uncertainty for businesses.

Supply Chain

Ongoing disruptions continue to create delays and higher costs.

Skills & Labour

Shortages of key labour and skills are limiting business capacity and growth.

These conditions highlight the need for a clearer, data-driven understanding of local business realities.

- Most available data is regional or provincial, offering limited visibility into local conditions.
- This project generates primary business-level intelligence to guide planning, investment, and policy decisions.
- Strengthening a competitive and resilient economy requires timely data, targeted action and coordinated strategy.

Strategic Economic Development: A County-wide Effort

County Level Value

A regional Economic Development lens is critical to **coordinated growth and shared prosperity**, by providing:

- Centralized business support
- Alignment across municipalities, businesses, and stakeholders
- Long-term economic resilience

1

County Economic Development Roles



Connector



Advocate



Investment Readiness



Workforce Champion

Leads region-wide economic strategy.

Champions major infrastructure priorities.

Builds the foundation for investment attraction.

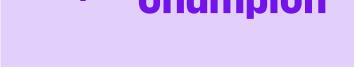
Conducts County-wide business retention & expansion.

2

Local Municipality Roles



Business Champion



Infrastructure Steward



Approvals Authority



Community Connector

Supports small businesses, main street activity, and communities.

Delivers community-level improvements.

Oversees zoning, permitting, and site-specific planning.

Promotes local job fairs and business events.

Methodology and Sources

The purpose of Phase 1 is to create a data-driven economic profile that aligns with the County's economic development objectives, providing the insights needed to shape strategic priorities and future investment decisions.

KEY OBJECTIVES:

- ✓ Identify real-time business challenges and emerging opportunities
- ✓ Assess resilience to trade, tariff, and supply chain disruptions
- ✓ Understand workforce gaps, talent mobility, and training needs
- ✓ Document infrastructure, servicing, and land constraints that impede growth
- ✓ Establish an evidence-based baseline to guide Phase 2 investment attraction
- ✓ Strengthen the County's role in advocacy, business retention and expansion, and coordinated economic planning

Document Review

A review of 40+ documents provided by Dufferin County and an analysis of available data.



Engagement with Local Businesses

Consultation with 25 local Dufferin County businesses and organizations through in-person interviews.



Online Survey

10 additional local businesses completed our online, digital survey that complemented our interview findings.



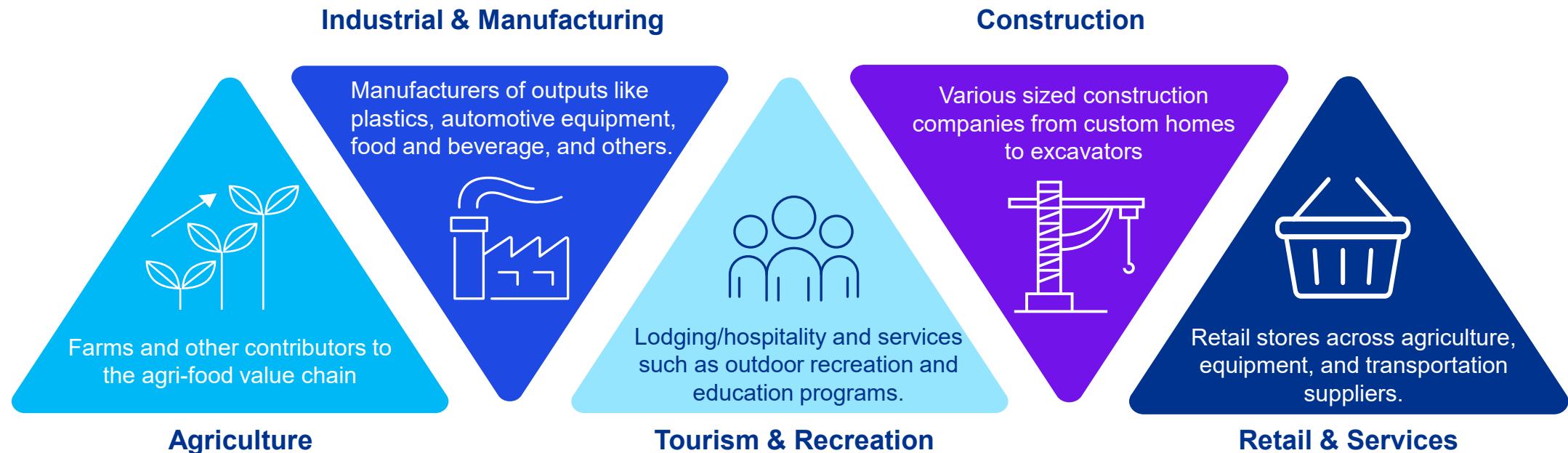
Secondary Research

We undertook further secondary research to complement our primary data collection.



Our Engagement Spans Key Sectors within Dufferin

KPMG engaged a broad cross-section of stakeholders to ensure a balanced representation of perspectives across the local Dufferin economy. Interviews were conducted with agricultural stakeholders along with other industries, such as manufacturing, construction, and retail. Additionally, Georgian College and the Dufferin Board of Trade were interviewed to ensure comprehensive coverage.



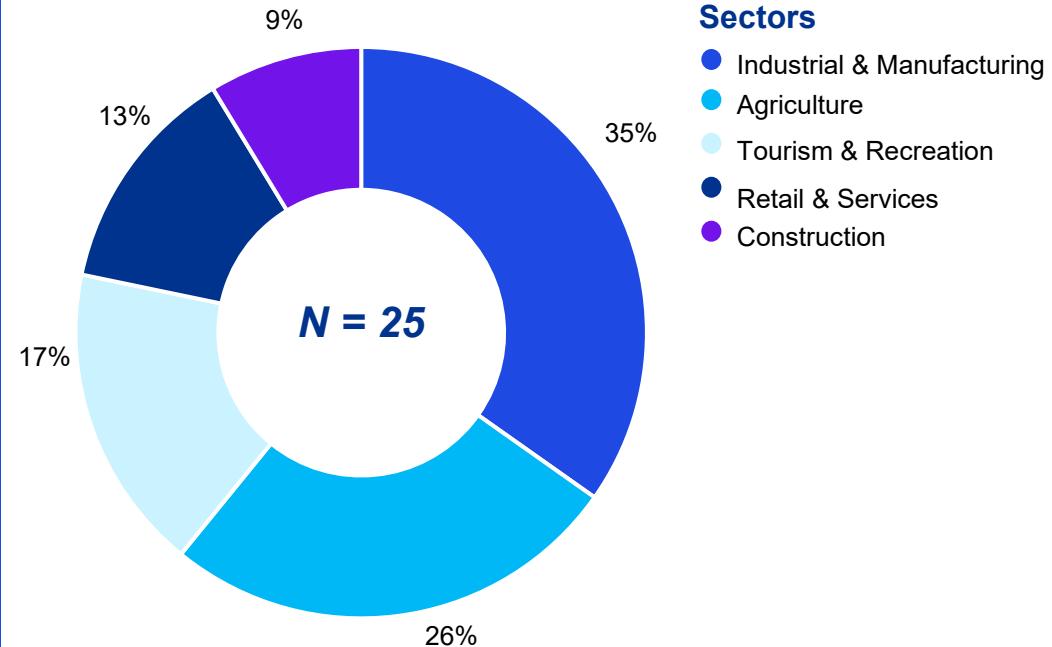
Who We Talked To

We talked to businesses across Dufferin County

- Amaranth
- East Garafraxa
- Grand Valley
- Melancthon
- Mono
- Mulmur
- Orangeville
- Shelburne

Sector Coverage

Our coverage included businesses across a variety of sectors and ages. This included businesses that opened in 2025 as well as long-established companies, with the earliest dating back to 1909.



Key Insights



53%

Businesses stated that they are directly or indirectly exposed to tariff risks



1,634

The number of jobs they employ

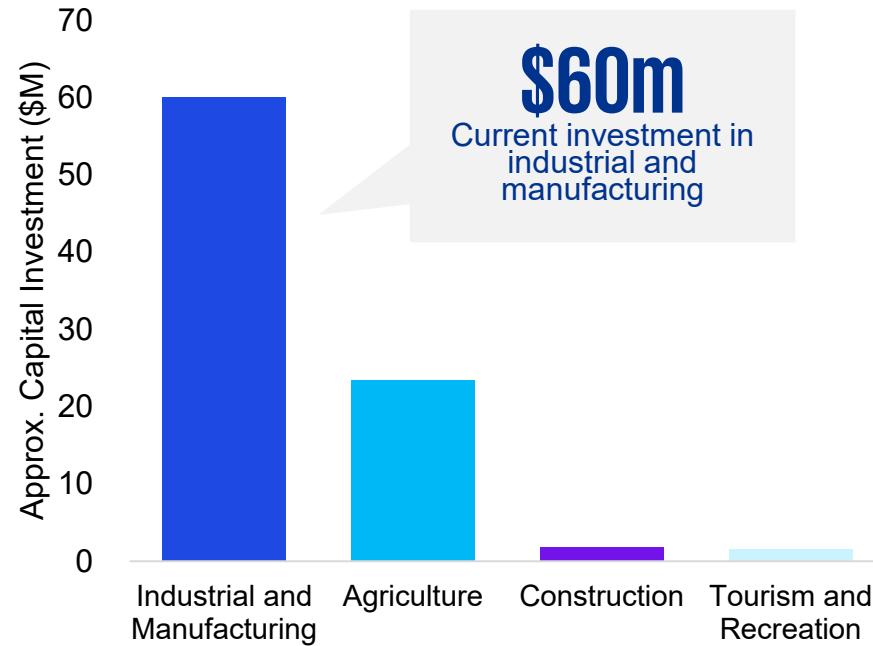


11%

Businesses made major capital investments in the last five years to expand and/or improve operations

Stakeholder Business & Investment Activity

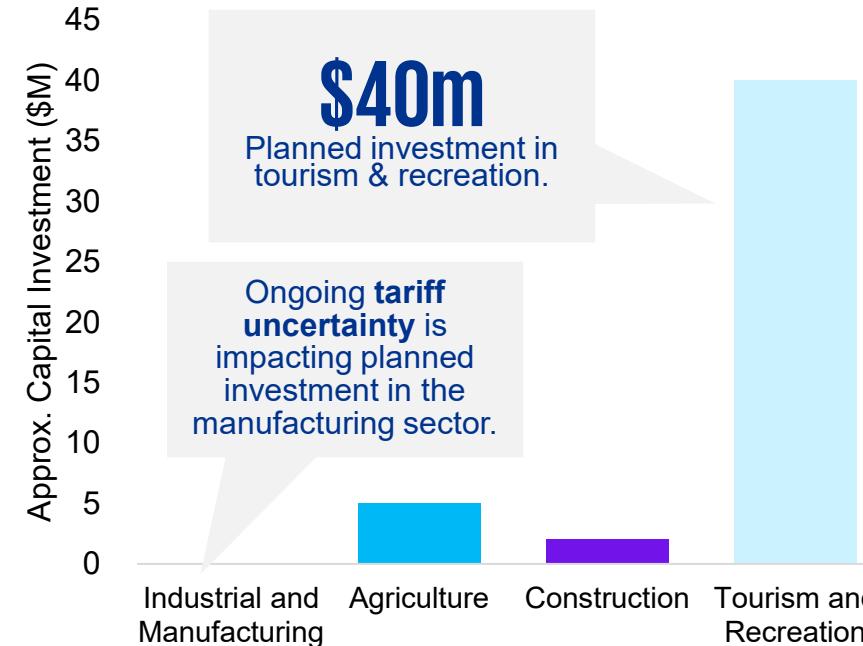
Current Investment



💡 In the past 5 years, over **\$85m** was invested in expansion projects. Majority of this came from manufacturing with projects focused on **expansion and new equipment with some on automation**. Agriculture also invested in **new equipment and robotic/automated systems**.

Note: The business investment data presented on this slide only represents investment reported to us through the 25 stakeholder interviews and the public survey. It does not represent total investment across Dufferin County.

Future Investment



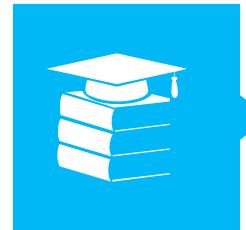
💡 About **\$50m** in planned investment was discussed, with the majority of this total in **expanding and revitalizing tourism and recreation services**. However, a significant barrier that many businesses highlighted was around challenges getting necessary permitting from Conservation Authorities.

Additional Themes Across Stakeholders



Uneven Permitting & Approvals

- **Inconsistencies:** Stakeholders cited lengthy, unpredictable permitting & zoning timelines.
- **Multi-agency complexity:** Projects requiring County, Local, & Provincial input can face unclear accountability and longer review.
- **Successes:** Kal Tire's Amaranth expansion was cited as a positive example of coordinated support and timely engagement.



Education & Training Ecosystem

- **Program constraints:** Georgian College's Orangeville campus faces funding and facility limitations, reducing access to skilled trades and technical programming.
- **Skills Development Fund (SDF):** The College expressed active interest in partnering with local employers and the County on SDF applications to co-develop customized training.



Tariffs: Mixed Impacts, High Uncertainty

- **Rising costs:** Manufacturers reliant on U.S.-made materials and equipment face price increases of 10%+.
- **Adaptive strategies:** Firms are exploring domestic and European opportunities to diversify supply chains but alternatives are limited.
- **Sectoral divergence:** Some (e.g., plastics) have benefited from redirected demand, while others are scaling back growth plans.



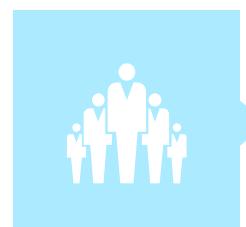
Investment in Modernization

- **Active reinvestment:** Many local businesses are investing in automation, facility upgrades, and efficiency improvements.
- **Constraints:** High construction and electricity costs, limited industrial infrastructure (e.g., rail), slow permitting as barriers.
- **Strategic realignment:** Some companies are investing in new / expanded facilities in the U.S. for improved market access.



Workforce Challenges

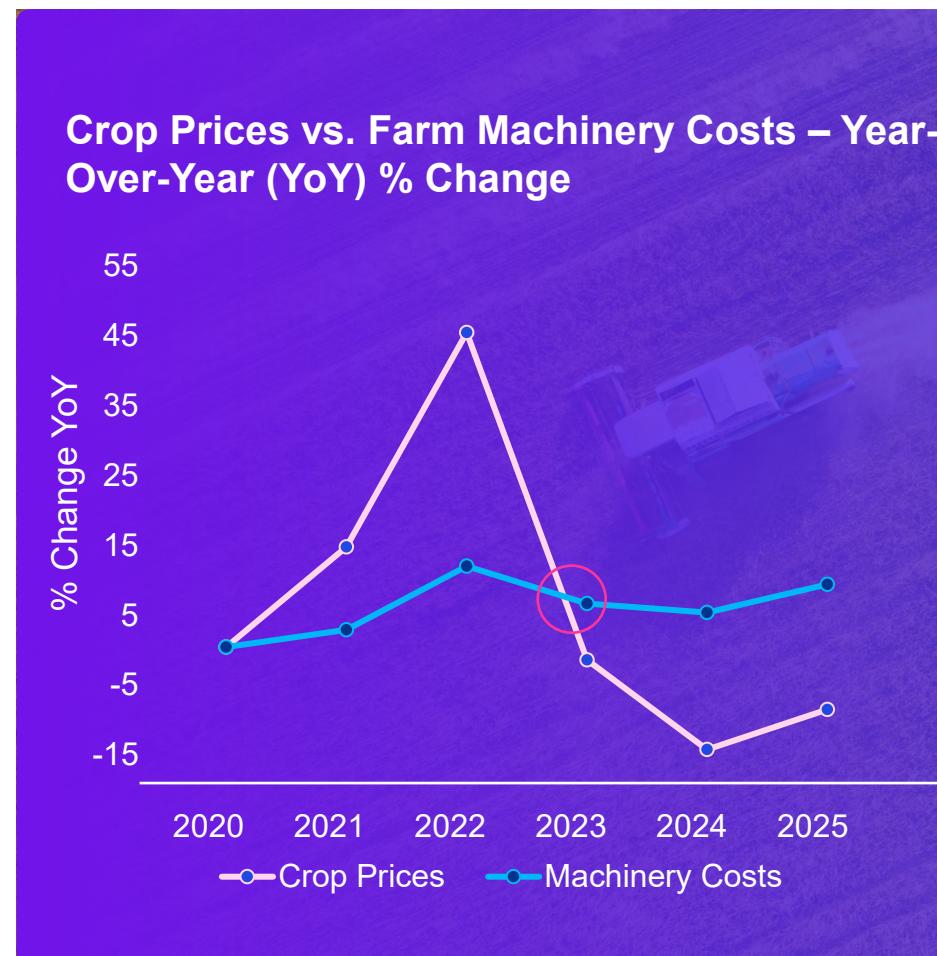
- **Skills gaps:** Shortages in trades and technical maintenance continue to create production risks and can delay expansions.
- **Retention pressures:** Lengthy commutes and limited affordable local housing are affecting labour attraction and retention.
- **Immigration constraints:** Complex pathways to PR are limiting access to international talent, particularly in rural areas.



Community & Government as Enablers

- **Strong relationships:** Businesses value the County's approachable, solutions-oriented culture.
- **Navigational support:** Firms may benefit from more hands-on guidance in identifying grants, loans, and incentive programs.

Market Volatility in the Agriculture Sector



9%

**Increase in Farm
Machinery Costs from Q1
2024 to Q1 2025**



-14%

**Decrease in Crop Prices
from Q1 2023 to Q1 2024**

Machinery input costs for farmers have steadily risen from 2020 to 2025. While total crop prices peaked in 2022 and have since declined.

This divergence is putting pressures on farm's profit margins as costs climb while revenues soften.

Source: Statistics Canada. Farm Product Price Index (FPPI), Total Crops — Table 32-10-0077-01; and Farm Input Price Index (FPI), Machinery & Motor Vehicles — Table 18-10-0265-01. National data, 2020–2025.

Key Themes: Agriculture Stakeholders



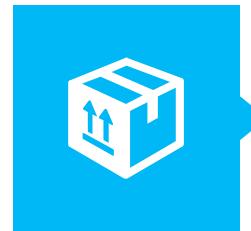
Evolving Agricultural Landscape

- **Industry consolidation:** The number of farms has declined over the past two decades due to land development and consolidation.
- **Business evolution:** Growth is shifting toward larger, capital-intensive operations with new value-added and agri-tourism opportunities.



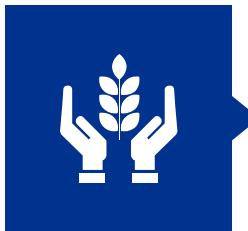
Cost Pressures & Market Volatility

- **Weaker commodity returns:** Crop prices have declined by up to 30% since 2022 peaks, while production costs remain high.
- **Uncertain markets:** Global trade tensions and freight costs are creating uncertainty around investment and pricing decisions.



Local Supplier Gaps

- **Supplier decline:** Many local ag-service providers have consolidated or relocated to larger hubs like Guelph.
- **Aging workforce:** Retirements and limited new entrants are reducing the availability of skilled specialists.
- **Competitiveness:** Maintaining access to local ag-suppliers was cited as essential to sustaining Dufferin's competitiveness.



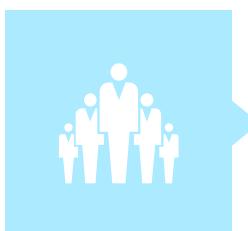
Generational Transition & Farm Viability

- **Succession challenges:** High land and buyout costs are limiting next-generation ownership transitions.
- **Policy flexibility:** Stakeholders noted part-lot severances or alternative ownership models to retain family involvement.
- **Rural continuity:** Without intervention, smaller farms risk consolidation, threatening community identity.



Regulatory & Permitting Bottlenecks

- **Inconsistent approvals:** Producers described lengthy, unpredictable permitting processes for barns and expansions.
- **Cumulative delays:** Inconsistent application of zoning and environmental reviews adds cost and complexity to investment.
- **Streamlining opportunity:** Stakeholders emphasized that more predictable permitting would support growth and reduce costs.



Strong & Collaborative Community

- **Community cohesion:** Dufferin is viewed as a close-knit, supportive community with strong local engagement.
- **Collaborative culture:** Numerous local forums and partnerships support knowledge-sharing and problem-solving.
- **Proactive government:** The County is recognized for its willingness to engage directly with businesses.

Next Steps

To move forward, we will focus on finalizing our Phase 1 Report and advancing the project to Phase 2.



Economic Report

Finalize detailed Economic Report with list of recommendations for the County's consideration.

1



Council Presentation

Present the Economic Report and detailed findings to Council.

2



Investment Attraction Strategy

Develop a Dufferin County Investment Attraction Strategy utilizing key findings from the research.

3



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