

MARCH 2020

# FOOD FOR THOUGHT

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# Dufferin County Business Retention & Expansion Report

Agriculture and Food Sector





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# Project Summary

## Project Background

Business Retention and Expansion projects have been identified in the Dufferin County Economic Development Strategic Plan (2017) as a key way of developing productive relationships with business owners in Dufferin County.

Dufferin County recognizes that the Agriculture and Food Sector is a powerful economic generator for our region during a time of strong population growth. Dufferin subsequently implemented a BR+E in the summer of 2019 to support this important area of our local economy. It was titled "Food for Thought" as the intent was to gather input and ideas from Dufferin's Agriculture and Food industry employers to complement business conditions based on their identified goals and recommendations. A sample size of at least 85 businesses was required in order to have a confidence level of 95% and a 10% margin or error. The total sample size attained during this project (164) greatly surpassed this threshold. As a result of the strong employer participation, a statistically significantly sample size was obtained. This indicates that responses to the BR+E survey can be extended to the Dufferin Agriculture and Food value chain as a whole.

## Project Goal

Engage Dufferin County's Agriculture and Food business community in an effort to gain valuable insight around the sector's immediate and future needs and determine how we can support positive change in an effort to enhance the business environment as it pertains to agriculture and food in Dufferin County.

## What is a BR+ E?

The Business Retention and Expansion (BR+E) project was developed by the Province of Ontario. It was created as an economic development tool to build relationships between local government and business owners, as well as collect data on what business owners believe to be the current business environment. This project was based on the Ontario Ministry of Food and Rural Affairs BR+E program, which outlines four stages to the project: Preparation, Collect and Analyze, Develop Goals and Action Plans and finally, Implement and Monitor.

This report provides details of steps one through three of the "Food for Thought" BR+E. The project timeline has been identified, along with some of the key findings throughout the process. Finally, the Agriculture and Food Action Plan for the County can be found at the end of this report.

## Agriculture and Food Sector:

The Ag and Food BR+E focused on businesses in the Ag and Food Sector, as outlined by the North American Industry Classification System (NAICS). Businesses in the following areas of the PST Sector were interviewed through this process:

- Animal Production
- Crop Production
- Agricultural Equipment Suppliers
- Agricultural Product Suppliers
- Agriculture Merchant Wholesalers
- Food and Beverage Wholesalers
- Food Production
- Food and Beverage Stores
- Restaurant and Food Services

## Interview Topics

All businesses interviewed were asked the same series of Community Questions, derived from the OMAFRA BR+E Retention Survey which covered the following topics:

- Business Information
- Business Climate
- Future Plans
- Business Development
- Workforce
- Community Development

## Project Timeline





# Acknowledgements

## Dufferin County Ag and Food Businesses and Organizations:

Thank you to our Agriculture and Food Businesses in Dufferin County for their participation in this project. We are appreciative of the knowledge shared which allowed the creation of this report and subsequent action plan. Thank you to the Agriculture and Food organizations in Dufferin County who assisted in this project through input and project promotion.

## Agriculture Advisory Group:

Sincere thank you to the Dufferin County Agriculture Advisory Group for their expertise and assistance in the creation of the Dufferin County Agriculture and Food Action Plan.

## OMAFRA:

A special thank you to Rian Omollo and Stephen Morris at OMAFRA who assisted in the data analysis of this project and provided support throughout and to Cheryl Brine at OMAFRA for her support throughout this project as well.



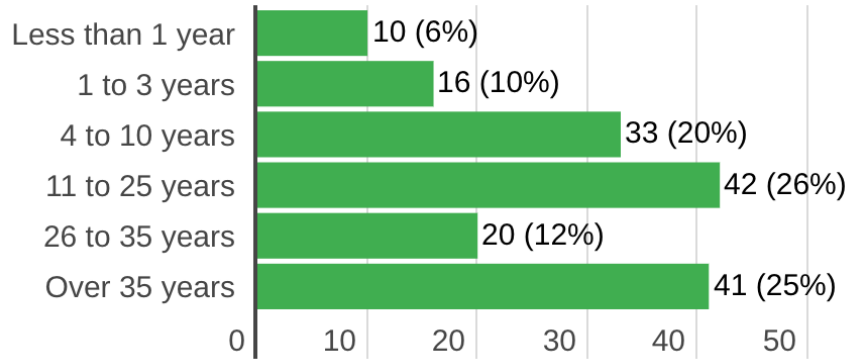
Municipality	% of Total Dufferin Population	% of Total Surveys
Amaranth	7%	7%
East Garafraxa	4%	7%
Grand Valley	5%	13%
Melanchton	4%	8%
Mono	14%	18%
Mulmur	6%	10%
Orangeville	47%	25%
Shelburne	13%	12%

Secondary Surveys Completed: **62** Farm Surveys **15** Tourism Surveys

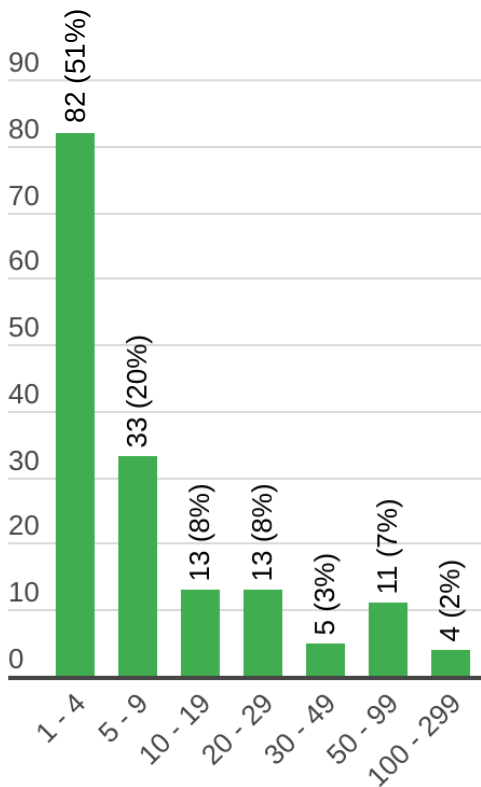
# Business Information

**36%** of Ag and Food businesses have been in operation in Dufferin County for 10 years or less

## Years in operation in Dufferin County



## Number of employees (including owner/owners)

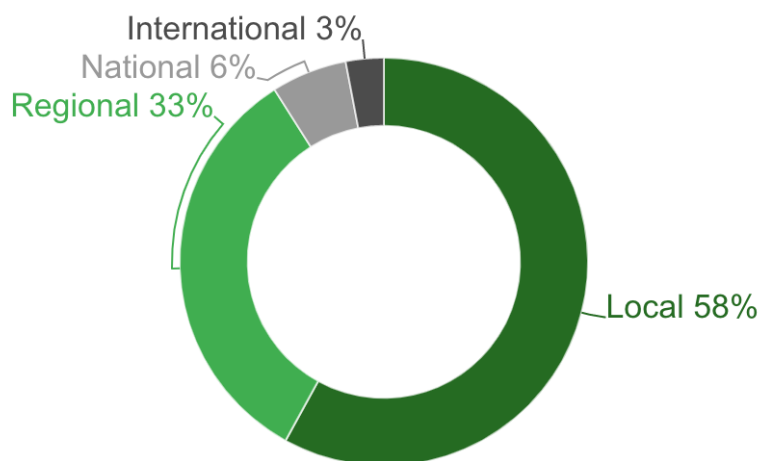


**71%** of Ag and Food businesses have less than 10 employees



**86%** of Ag and Food businesses are locally owned and operated with one location

## The primary market of Ag and Food businesses



**91%** of Ag and Food businesses conduct their business in and around Dufferin County



# Industry Outlook

**“ We’ve always been here growing and will be again next year too ”**



**81%** of respondents think that Dufferin County is a good - excellent place to do business



**61%** of respondents think support from local residents is good - excellent

The growth of the Dufferin County community supports the growth of our businesses!



**92%** of Ag and Food businesses plan on remaining the same size, or expanding within the next 18 months.



**74%** of Ag and Food businesses feel that the outlook on their industry is stable-growing



**61%** of Ag and Food businesses expect sales to increase in the next year

# Workforce



**95%** of Ag and Food employers reported stable - increased number of employees over the past three years



**NEW** employment opportunities (jobs) have been created in Ag and Food businesses in the past three years

**“ We simply need more reliable help ”**



**69%** of Ag and Food employers rated workforce stability as poor - fair



**69%** of Ag and Food employers have difficulty attracting new employees



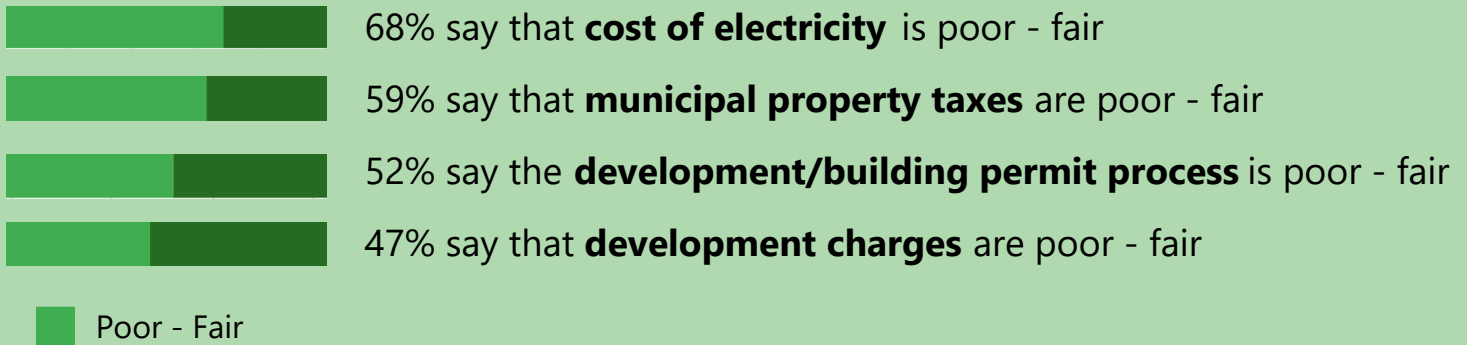
**75%** of Ag and Food employers rated availability of qualified workers as poor - fair



**56%** of Ag and Food employers have difficulty retaining new employees



# Areas for Improvement



**66%** of Ag and Food employers reported that availability of adequate housing is poor - fair



**12%** of Ag and Food businesses reported having difficulty renewing their lease on property

**“ Our employees can’t afford to live here, which makes it hard to find staff ”**



**1 in 3** businesses say internet speed is a barrier to doing business in Dufferin



**55%** of Ag and Food businesses say that internet access is poor - fair



**16%** of Ag and Food businesses say that internet cost is a barrier to doing business in Dufferin

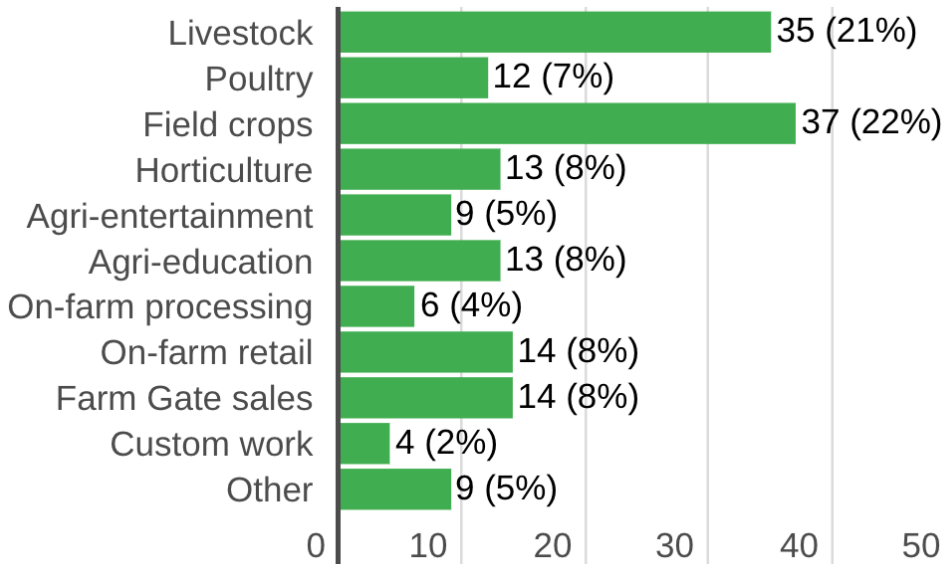


**45%** of Ag and Food businesses say that cell phone service is poor - fair

**“ Internet accessibility is awful. It limits our business capabilities and expansion opportunities ”**

# Farm Survey Results

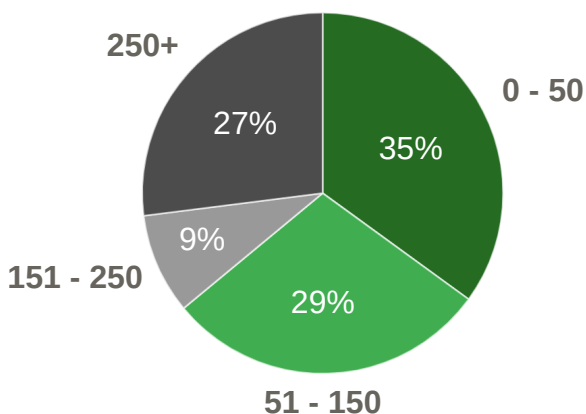
## Type of Agriculture Business



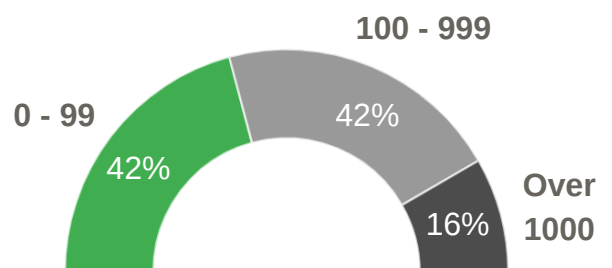
**“ There is a growing market. You have to always check to know what to produce ”**



## Livestock - Herd Sizes



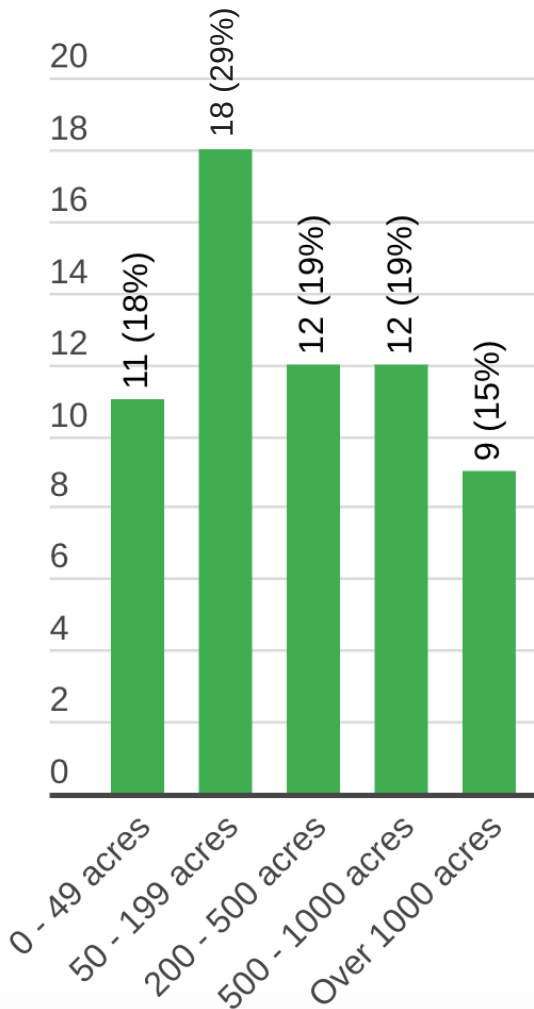
## Poultry - Flock Sizes





# Farm Survey Results

## Workable Acreage



**“ More time in business here has lead to greater connecting and support from agricultural community ”**



**47%** of Farm Survey respondents rated agri-business advisory services as poor-fair



**44%** of Farm Survey respondents rated access to value chain opportunities as poor-fair

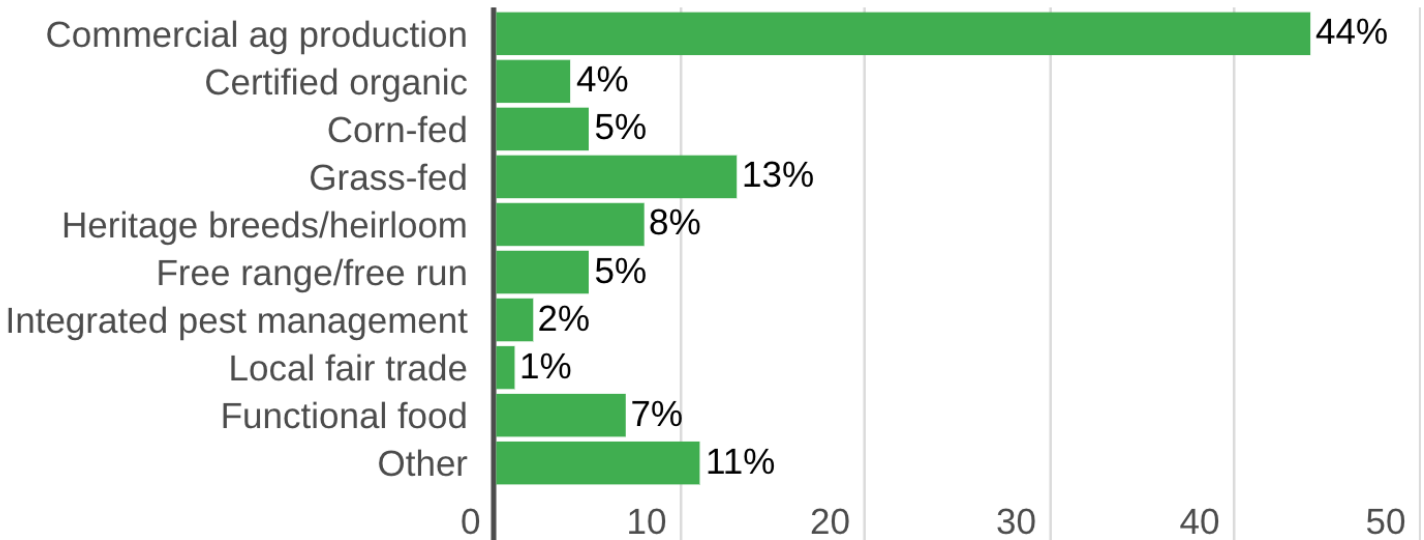
# Farm Survey Results



**80%** of Farm Survey respondents indicated they anticipate changing their production practices to respond to changes in climate or environment

**“There is a growing awareness of healthy eating and environment in the community”**

## Types of Farming Activities



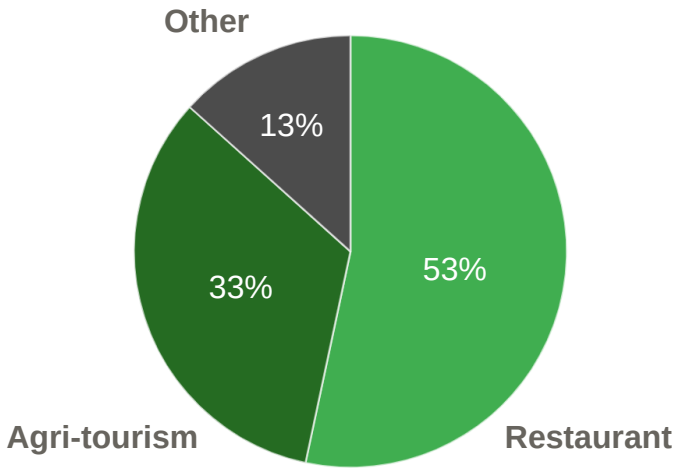
**57%** of Farm Survey respondents have on farm retail or farm gate sales

**74%** of Farm Survey respondents indicated that they feel there are barriers in the community to expanding farm retail or farm gate sales



# Tourism Survey Results

## Type of Business








**87%** of Tourism businesses are open all year round



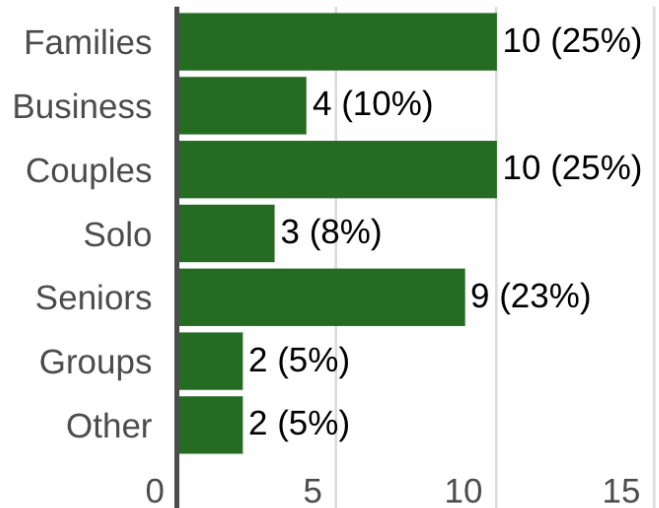
**67%** of Tourism Survey respondents rated food services as good-excellent

**“ People come to see this area for all the wonderful outdoor activities ”**

## Tourism Survey respondents are dissatisfied with:

-  Availability of public washrooms
-  Highway rest areas
-  Accommodations
-  Highway signage
-  Information centres

## Types of Visitors



**93%** say their TARGET MARKET is **LOCAL**



(within 100 KM of Dufferin County)



# Conclusion

## Top advantages and disadvantages of doing business in Dufferin County



### Advantages

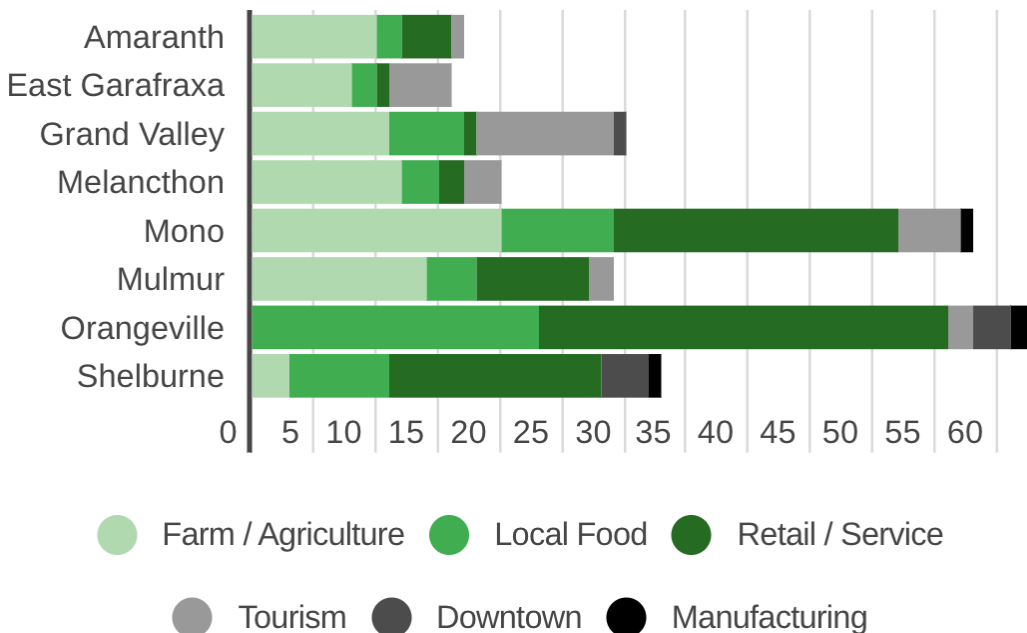
1. Location - proximity to GTA
2. Supportive business community and customer base
3. Excellent agriculture land



### Disadvantages

1. High cost of doing business
2. Lack of marketing of community and local business
3. Slow and complicated development process

### Business Sector



### Tourism Advantages



Natural beauty



Positive business community



Small town charm

Ag and Food employers are interested in working with other businesses in Dufferin County to pursue:

Joint Marketing

Joint Training

Joint Networking

# Action Plan

## DUFFERIN COUNTY

	ACTION	TIME FRAME	LEAD/PARTNER	MEASURE
WORKFORCE & EDUCATION	Examine connecting Norwell DSS LEAF program with the Dufferin business community. Investigate opportunities for LEAF program in Dufferin high schools.	0 - 24 months	Dufferin County, UGDSB, private sector businesses	<ul style="list-style-type: none"> <li>School Board activity around Dufferin County</li> <li>LEAF/Agriculture education initiative and private business sector involvement</li> </ul>
	Invest in regional job board initiative.	0-6 months	Dufferin County, WPBWWD	<ul style="list-style-type: none"> <li>Launch job board</li> </ul>
	Investigate and partner with local organizations that support employment with the Dufferin Ag and Food community i.e. Georgian College, etc.	0 - 12 months	Dufferin County, Georgian College, UGDSB	<ul style="list-style-type: none"> <li>Connections made and partnerships created</li> </ul>
	"Would you like to work here?" Campaign to assist local ag hiring initiatives.	0 - 18 months	Dufferin County, private sector businesses, Partner Municipalities	<ul style="list-style-type: none"> <li>Create partnerships and initiate sign campaign</li> </ul>
	Investigate opportunities to provide dwellings for workforce in a cost-effective manner.	0 - 12 months	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>Write report showcasing supports and initiatives with municipalities for workforce dwelling supports</li> </ul>
MARKETING / TOURISM	Develop tourism/marketing strategy to promote the Agriculture and Food sector.	0 - 12 months	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>Development of a Dufferin Tourism Strategy for regional marketing/tourism advancement</li> </ul>

# DUFFERIN COUNTY

## MARKETING / TOURISM

ACTION	TIME FRAME	LEAD/PARTNER	MEASURE
Increase marketing connections to showcase Dufferin Agri-tourism in other regions/large urban centres.	Ongoing	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>Creation of local food campaign and will use website and social media analytics</li> </ul>
Explore opportunities to complement existing or new Agri-tourism in Dufferin. i.e. wayfinding sign prospects, Dufferin Farm Tour, etc. Further develop relationships with municipalities, BIA's, farm groups, etc. to increase overall capacity.	Ongoing	Dufferin County, local Ag and Food organizations, Partner Municipalities	<ul style="list-style-type: none"> <li>Partnerships built with Dufferin organizations and municipalities to benefit Ag and Food marketing activities</li> </ul>
Encourage residents to shop local through marketing campaigns.	Ongoing	Dufferin County, local Ag and Food organizations, Partner Municipalities,	<ul style="list-style-type: none"> <li>Use website and social media analytics and/or employer feedback</li> </ul>
Conduct a gap analysis on the Ag and Food sector in Dufferin.	0 - 24 months	Dufferin County	<ul style="list-style-type: none"> <li>Completion of gap analysis</li> </ul>
Educate the public on the Ag and Food sector.	Ongoing	Dufferin County, local Ag and Food organizations, Partner Municipalities, UGDSB	<ul style="list-style-type: none"> <li>Web site and social media analytics</li> <li>Event(s) attended</li> </ul>

## BUSINESS SUPPORTS

Explore simplifying business development/ planning processes.	0 - 24 months	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>Service Delivery Review</li> </ul>
Continue to advocate for natural gas expansion. Maintain relationships with Enbridge and the Federal/ Provincial governments.	Ongoing	Dufferin County	<ul style="list-style-type: none"> <li>Relationships built with Enbridge</li> </ul>



# DUFFERIN COUNTY

	<b>ACTION</b>	<b>TIME FRAME</b>	<b>LEAD/PARTNER</b>	<b>MEASURE</b>
<b>BUSINESS SUPPORTS</b>	Facilitate Ag and Food industry networking opportunities.	Ongoing	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>• Events held</li> <li>• Number of businesses in attendance</li> <li>• Promoting events</li> </ul>
	Investigate opportunities to expand internet capabilities in Dufferin.	Ongoing	Dufferin County	<ul style="list-style-type: none"> <li>• Enhanced internet service</li> </ul>
	Investigate opportunities to use County infrastructure as an internet hub for business.	0 - 24 months	Dufferin County, Partner Municipalities	<ul style="list-style-type: none"> <li>• Report on potential opportunities of utilizing related County assets</li> </ul>
	Examine SBEC resources that can further complement Ag and Food sector and share existing resources with rural-based businesses	0 - 12 months	Dufferin County, SBEC	<ul style="list-style-type: none"> <li>• Report on SBEC opportunities for Ag and Food community</li> <li>• Increase in rural businesses utilizing services</li> </ul>
	Encourage on-farm diversification through policy and education.	Ongoing	Dufferin County, Partner Municipalities, SBEC	<ul style="list-style-type: none"> <li>• Refine policy</li> <li>• Educational sessions held</li> </ul>
<b>CLIMATE CHANGE</b>	Support climate change activities that assist Dufferin businesses, showcase success and complement related county initiatives.	Ongoing	Dufferin County, Partner Municipalities, SBEC	<ul style="list-style-type: none"> <li>• Information shared via economic development outlets</li> </ul>

SBEC - Small Business Enterprise Centre

UGDSB - Upper Grand District School Board

WPBWWD - Workforce Planning Board Waterloo-Wellington-Dufferin

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Agriculture and Food Sector

